IMPLEMENTING PAY EQUITY IN THE WORKPLACE

REVISED EDITION OF
"Pay Equity in Small Workplaces"

THE
PAY EQUITY
COMMISSION

Ontario

91-00498/

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PURPOSE

OF THE

WORKBOOK

PURPOSE OF WORKBOOK

On January 1, 1988, the Pay Equity Act, 1987 came into effect in Ontario to address the undervaluation of work performed by women.

The Act requires employers to compare female job classes, (jobs mostly done by women), to male job classes, (jobs mostly done by men), to find job classes of equal or comparable value. Job classes are compared on the basis of four factors: skill, effort, responsibility and working conditions. The method used to compare jobs must be free of gender bias. A female job class found comparable in value to a male job class must be paid the same job rate.

The Pay Equity Office produced this workbook to help organizations achieve pay equity. Use this workbook with the following publications:

o The Pay Equity Implementation Series of Guidelines:

This series of guidelines explains what pay equity implementors are responsible for, focuses on sections of the Act pertaining to a single issue and suggests "how to" options.

#1 Introduction and Answers to Common Questions
#2 Definition of Employer
#3 Calculating the Number of Employees in the Private Sector
#4 Definition of Establishment
#5 Determining Job Class
#6 Using the "Group of Jobs" Approach
#7 Determining Gender Predominance
#8 Disclosing Information
#9 Gender-Neutral Job Comparison
#10 Which Job Classes to Compare
#11 Determining Job Rate - Salaries/Wages/Payments
#12 Determining Job Rate - Benefits
#13 Permissible Differences in Compensation
#14 Pay Equity Adjustments
#15 Pay Equity Plans
#16 Dispute Resolution 1 - Review Services
#17 Dispute Resolution 2 - P.E. Hearings Tribunal
#18 Small Private Sector Employers

o How to Do Pay Equity Job Comparisons

How to do Pay Equity Job Comparisons is a Pay Equity Office booklet which talks about collecting and recording job information; understanding job evaluation; and ensuring gender neutrality in job evaluation.

These publications are available without charge from the Pay Equity Office. See page 213 for how to order these and other materials.

Using the Workbook

This workbook explains pay equity. It contains an implementation checklist, a profile of a private sector firm implementing pay equity, a chapter on job information including how to develop a questionnaire, tips for implementing pay equity, a discussion of gender neutralilty, and further resources.

Job comparison is illustrated with three sample systems. The Paired Comparison System, for up to eight to ten jobs, and the Basic Point Factor system, for up to 15 to 20 jobs, may be useful in small workplaces, or larger workplaces with only a few jobs. Exercises on choosing, adapting and weighting factors are provided to help you to adapt these systems to your workplace.

The third system, An Adaptable Twelve Subfactor Point System, may be useful for any number of jobs. It includes a questionnaire developed to fit the system and directions on how to modify the system for your workplace. All of these systems are provided for educational purposes and by no means are intended to limit your choice of a system.

The material in this workbook is for educational purposes only. The Pay Equity Commission does not recommend or endorse any job comparison system.

Why do we need pay equity?

In 1986, there was a 36% difference between the average wage in Ontario of full-time working women and full-time working men. Studies have shown that nearly one-quarter to one-third of that wage gap results from certain occupations in which women predominate, such as clerical or retail sales jobs, not being valued or paid as highly as occupations in which men predominate, such as carpentry or accounting.

How does pay equity relate to employment equity?

Employment equity requires fair employment practices for all employees regardless of race, gender, disability and religion etc.. The focus is on fairness in hiring, promotion, pay, training, etc.

In pay equity, the focus is on pay -- fairness in pay for jobs filled mostly by women in comparison to jobs filled mostly by men.

What is required by the pay equity legislation?

Under the Act, employers in Ontario are legally required to achieve and maintain pay equity.

Pay equity requires pay adjustments so that female job classes found equal or comparable in value to male job classes will be paid the same job rate (a combination of salary and benefits) as their comparable male job class.

Posting Pay Equity Plans

Employer	Mandatory Posting of P.E. Plans	First Pay Equity Adjustment
Public sector	Jan. 1, 1990	Jan. 1, 1990
Private sector with 500 or more employees	Jan. 1, 1990	Jan. 1, 1991
Private sector with 100 to 499 employees	Jan. 1, 1991	Jan. 1, 1992
Private sector with 50 to 99 employees	Jan. 1, 1992*	Jan. 1, 1993
Private sector with 10 to 49 employees	Jan. 1, 1993*	Jan. 1, 1994

The number of employees is the average number of employees in 1987. See Implementation Series #3: Calculating the Number of Employees in the Private Sector. If a new employer is created or if a tenth employee was hired after January 1, 1988, pay equity must be implemented **immediately** and not according to the above schedule.

***Options for Private Sector Employers with between 10 and 99 employees in 1987**

Option 1: Develop and post a pay equity plan

If you choose to prepare and post a plan, pay equity adjustments are made according to the plan, at the rate of 1% a year, until pay equity is achieved. Adjustments will begin on January 1, 1993, if you have 50 to 99 employees and on January 1, 1994, if you have 10 to 49 employees. See Implementation Checklist, page XX

Option 2: Achieve Pay Equity without posting a Pay Equity plan

If you choose not to prepare and post a plan, you cannot phase in pay equity. You must achieve pay equity by January 1, 1993, if you have 50 to 99 employees and by January 1, 1994, if you have 10 to 49 employees. Should there be a complaint, you may be asked to identify the steps you took and the calculations you made to determine if pay equity adjustments were needed. The Implementation Checklist on page XX will help you do this.

*See Implementation Series #18: Small Private Sector Employers.

IMPLEMENTATION CHECKLIST

FOR PAY EQUITY

IMPLEMENTATION CHECKLIST FOR PAY EQUITY

FOR FIRMS POSTING PAY EQUITY PLANS

Steps to Pay Equity	How To Do
1. Determine: a) employer b) number of employees c) time frame d) number of unions and number of plans required	From this information, you will know how many pay equity plans are needed and, for private sector employers, the date pay equity adjustments are to begin.
Communication between employer and union	Employer/union contact to discuss negotiation of pay equity: employer, establishment, job class, pay equity plan(s). Reference: Implementation Series #1, 2, 3, 4 and 8.
2. Use existing information on jobs to estimate female job classes and male job classes, and to guide selection of job comparison system, which must measure all jobs fairly.	Use existing job descriptions and other information to estimate female and male job classes. Job classes are composed of jobs with similar duties and responsibilities; similar qualifications; the same compensation schedule, salary grade or range of salary rates; and filled by similar recruitment procedures.
	Assess the scope of tasks ahead. Will you need a basic or a more complex job comparison system?
Communicate with employees.	Identify planning and communication needs. Communicate basic facts of pay equity and how organization/union intends to proceed to achieve pay equity. Reference: Implementation Series #5, 6 and 7, and How to Do Pay Equity Job Comparisons, Chapter 1.

3. Select, or union/ employer negotiate, a job comparison committee.	A committee is not required by the Act but is advised. You may choose to involve the committee in the selection of a job comparison system.
Select, or union/ employer negotiate, appropriate comparison system.	Job comparison systems must use the factors of skill, effort, responsibility and working conditions and be gender neutral.
Collect and revise job information. Use to be sure all job classes are properly identified.	Collect and record complete, accurate, gender-neutral and up-to-date job information in a consistent way for all employees. Use a questionnaire and/or interviews. (You may rewrite this in a job information statement). Be sure the information is compatible with the job evaluation system. Be sure employees are satisfied that the information fairly describes their jobs. Use this job information to check that all job classes are properly identified. Reference: Implementation Series #1, 5, 6, 7 and 8 and How to Do Pay Equity Job Comparisons, Chapters 1, 2 and 3.
4. Evaluate all female job classes and all male job classes which may be potential comparators.	Ensure the job information, the comparison system and the actual evaluation are free of gender bias. Train committee on pay equity, gender neutrality and the system to be used. Reference: Implementation Series #9 and How to Do Pay Equity Job Comparisons, Chapters 2 and 3.
5. Determine comparable jobs.	The Act outlines a process that determines how female job classes are to be compared to male job classes. Reference: Implementation Series #10.

6. Develop a system to compare job rates (salary and benefits).	To do these comparisons, identify the job rate (salary plus benefits), and adjust wages to a common base, e.g. a rate per hour. Then, apply job rate to male and female job classes.
Compare compensation of each female job class with its male comparator job class.	Identify differences in compensation which must be made up. If a permissible difference is being used, indicate: a) for which male comparator job class b) which permissible difference is being used c) why d) the portion of the job rate which is due to the permissible difference Reference: Implementation Series #11, 12 and 13.
7. Determine adjustments required to achieve pay equity for each pay equity plan.	The Act outlines a process that determines the adjustment of the female job classes. For each plan, determine where to make adjustments, as well as the rate and timetable for the adjustments. At least 1% of the previous year's payroll, or the amount to achieve pay equity, whichever is less, must be used for pay equity adjustments.
Determine schedule of adjustments.	Describe how compensation in job classes without pay equity will be adjusted. List: o each female job to be adjusted o the job rate difference between each female job class and its male comparator o the pay equity adjustment to be made this year o the payroll period in which the first adjustments will be made and the date on which the payment will begin Reference: Implementation Series #14 and 15.

8. Prepare a pay equity document for each establishment. Communicate plan(s) and process for employee review, questions and appeals.	The documents for each establishment include a plan for the non-bargaining unit, and a plan signed off with the union for each bargaining unit. Set up an internal review process so employees understand the plan, know who to contact with questions, and the process for appeals. Reference: Implementation Series #1, 3, 5 and 15.
9. Post the pay equity plan on mandatory posting date.	Post the plan in a visible area so all the employees are able to review it. Reference: Implementation Series #15.
10. Deal with any objections or complaints.	Resolve questions, concerns, complaints. The plan is considered approved when no concerns are forthcoming from non-unionized employees and 127 days after the mandatory posting date have elapsed. Plans with unions will be considered approved when the bargaining agent and employer agree to the plan's terms. If a complaint has been registered with the Commission, a review officer will attempt to effect a settlement. Unions, employees or employers may request a hearing concerning a review officer's order. Reference: Implementation Series #16.
11. Make required adjustments.	Reference: Implementation Series #14 and 15.

PROFILE:

PAY EQUITY IN A SMALL COMPANY

A PROFILE: PAY EQUITY IN A SMALL COMPANY

This section describes, largely in their own words, how a small company achieved pay equity. They took some advice from Pay Equity Office publications, but worked out a unique process effective for their own establishment. Others may find their experience useful.

* * *

Senior management in a sixteen job non-unionized security equipment distribution company formed a strategy committee to implement pay equity. Members of the committee included the president and general manager, the controller, the sales and marketing manager, and the distribution manager.

The committee determined that they would post a pay equity plan for their sixty-five Ontario employees on January 1, 1992, (although posting a plan is voluntary for between ten and ninety-nine employees).

They used their current classification of jobs, and current job descriptions, to identify their jobs as female or male job classes according to the definition of the Act. They planned to review these decisions on job classes to see if they needed revision once they had systematically collected job information to fit their job comparison system.

Female job classes included Accounts/Payroll Clerk, Data Entry Operator, Picker/Packer, Receptionist, Sales and Marketing Coordinator, Sales and Marketing Manager, Secretary 1, Secretary 2, Word Processor Operator. Male job classes included Buyer, Controller, Distribution Manager, President and General Manager, Sales Representative, Service Technician/Installer, Storeskeeper. This information enabled them to identify which job classes they needed to compare and hence to assess the extent of the pay equity task.

The committee decided to proceed in three stages:

- **Stage One:** Get a feel for the process of comparing job classes by doing a fast listing of the order of importance of jobs in the company.

- **Stage Two:** Select the system used to compare jobs, then turn the work of comparing jobs over to a subcommittee or job comparison committee which would value jobs and determine comparable jobs.

- **Stage Three:** Review the results and develop a schedule of adjustments.

Stage One

The committee members read through the job descriptions on file. They found that for many jobs there were no descriptions and that for others the descriptions were out of date and, consequently, inaccurate.

Still, each member took 10 minutes to make a list in which all sixteen jobs in the company were ranked, from the job of greatest value to the job of lowest value. The lists were displayed, which provoked both laughter and discussion as each member explained the reasons behind her/his list. The following came out of the discussion:

- There were gaps in information and lack of consistency in collecting job information. For example, some jobs were described in great detail, while other jobs were described in a brief statement.

- There was a need to separate the person from the job. For example, one job description was written around a particular person's activities, rather than job requirements.

- There was a need to keep employee performance separate from pay equity. The strategy committee knew that one employee was not performing adequately in the job. This would have to be dealt with by an evaluation of the employee's performance. Pay equity calls for evaluating what is required by the job, not the performance of employees in the job.

- There were attitudes toward jobs which some committee members felt reflected gender bias. For example, one member consistently rated all female-dominated jobs very low.

- There were widely different ideas about what gender bias meant and how to recognize it.

- There was no common definition for any of the four factors required to value jobs. Each committee member had a different idea of what was meant by skill, effort, responsibility or working conditions.

- There was no agreement on the importance of each factor to the company. Some members felt skill was the most important factor; others, responsibility; and so on.

This first stage proved to be an interesting exercise. It revealed challenges ahead in ensuring the credibility of the job comparison system and in obtaining employee acceptance of changes in pay. Careful thought and planning and regular communications with employees would be needed.

The committee decided to take this opportunity to look at **all** the jobs in the company, not just the female and male job classes required to be valued by the Act, to be sure they were compensating **all** jobs fairly in terms of their value to the company.

The controller was assigned to develop a detailed plan for implementing pay equity and for communicating with employees.

The next stage would determine the job comparison system, including defining the factors for job comparison and deciding their weight or importance.

Stage Two

Selecting the Job Comparison System:

The strategy committee reviewed a number of job comparison systems and settled on a basic point factor system. It lent itself to easy modification of factors and weights to suit their workplace.

Defining Factors:

The committee met again and had a freewheeling discussion based on the following questions:

- If we were setting out to design jobs for this company, what would need to get done?
- What are the key responsibilities?
- What tasks and duties are efficient and effective?
- What kind of skills, mental effort and physical effort are critical to this company?
- What are the various working conditions under which employees work?

The discussion clarified the goals and work of the organization, and the work performed by employees that the company valued.

Each committee member then defined what he or she wanted in a definition of the factors of skill, effort, responsibility and working conditions. Statements were compared, revealing common ideas. One member put the ideas together and defined each factor in a paragraph, which the committee approved.

Weighting Factors:

The discussion on defining factors was also useful when it came time to weight the factors. The strategy committee had to decide if the factors of skill, effort, responsibility and working conditions were of equal importance to the company, or whether one or more factors were of greater importance than tne others.

First, the committee summed up the previous discussion:

- What is the essential work of the company?

- What are the key duties of our employees?

Next, each member reviewed the definitions they had agreed on for each factor, and decided which factor was of greatest importance to the company in the light of the essential work of the company and the key duties of the employees. Each gave the factor he or she considered the most important factor a 4, the next most important a 3, the next most important a 2, and the least important a 1.

After some discussion, and members changing their minds, the committee recorded each person's list, averaged the results, rounded the averages and found the resulting weights acceptable to the committee as a whole. For an illustration, see page 81.

Collecting Job Information:

The strategy committee asked the controller to be responsible for developing and testing a questionnaire based on the factors they had chosen. Chapter One of the booklet How to do Pay Equity Job Comparison was helpful here. They wanted to be sure information about jobs was collected in a consistent manner, paying particular attention to details commonly overlooked in women's jobs.

The strategy committee asked that the job information collected be presented in a consistent manner and include:

- a summary of the job
- five or six key duties performed by the employee and the percentage of time each took
- other important duties, including when employees fill in for other's jobs
- the "know how" and skill to do the job, the mental and physical effort, the responsibilities, and the working conditions under which the work is done.

They recommended holding information sessions for employees **before** they were asked to fill out the questionnaire. This way, employees would understand the requirements of the Act, the factors used to compare jobs and the importance of complete, accurate, and up-to-date job information. After the information from all jobs was reviewed a staff member was assigned to do follow up interviews to clarify unclear or missing information and make sure there was a consistent level of detail collected from all employees.

The same staff member rewrote the interview results into job information statements, which ensured that information was presented with a consistent use of words, and amount of detail, from all departments. Employees and supervisors discussed these final statements, and any disagreements were settled. Employees were to sign off that they were satisfied that the information was accurate and complete.

Selecting the Job Comparison Committee:

Two employees were elected by fellow employees to join two of the original committee members on a subcommittee to compare jobs. This subcommittee or job comparison committee organized training for itself on pay equity, on gender bias and on how the basic point factor system worked. They used exercises from the Pay Equity Office's materials to get used to working together.

Comparing Jobs:

The committee used the newly developed job information statements. They allotted points on the basic point factor system. Each committee member first allotted points for all jobs for skill. The committee then discussed the results and came to a consensus. They moved on to the next factor, each time recording reasons for decisions when there were differences in opinion. A couple of times the statement was unclear, and they asked for more information from the employee and the supervisor. At the end they reviewed their work to be sure they had valued jobs in a consistent way.

All jobs were then listed, starting with the job class of highest value. Comparable jobs were identified, (in this company jobs which fell within a five point range were considered comparable).

The strategy committee reviewed these results. They asked that some jobs be reviewed again because they were not sure those jobs had been rated fairly.

A meeting for all employees was held, during which time members of both committees explained the job comparison system again: the factors, the weighting, and the process used to compare jobs. Employees learned the procedure for further questions or appeals. Some employee appeals were considered and one employee persuaded the job comparison committee to change a rating.

The strategy committee then approved the final results.

Stage Three

The controller reviewed the job rates (a combination of salary and benefits) of the female job classes and their comparable male job classes to identify changes needed in the female job rates. This gap would be posted in the pay equity plan.

Where needed he set up new salary scales reflecting experience and performance. Employees in female job classes were slotted into these scales, and the necessary adjustments calculated between their current pay, and the place they should be in the new pay scale. Using 1% of the previous year's payroll, he identified the adjustments to be paid out starting on the first adjustment date. He prepared the final pay equity plan for posting.

When the strategy committee reviewed the rating of all jobs, the pay equity adjustments and the resulting compensation system as a whole, a number of other compensation issues emerged:

- The company felt there were still too many wage groupings for the number of jobs.
- Some male job classes of comparable value were paid very differently. Job rates for certain jobs were too close together.
- For many jobs there was no consistent policy on starting levels, or recognition of qualifications or experience. This had led in the past to employees feeling unfairly treated.

The controller was assigned to do further work on the company's compensation system.

In the end, the strategy committee was satisfied that the pay equity exercise brought benefits. The process forced a focus on the objectives of the business and what the company was currently paying for and a framework for change resulted.

The members were confident that following further examination by the controller and recommendations for change, a better, fairer compensation system would emerge. The company would be closer to paying for what it valued. The committee was also pleased to have eliminated bias in pay for female employees, which they were surprised to discover had been present in their compensation system.

GENDER

NEUTRALITY

GENDER NEUTRALITY and CHECKING FOR GENDER BIAS

Gender Bias

Gender bias in compensation means that the **gender** of the **person in the job**, i.e. a man or a woman, has influenced how the job is paid. Gender bias results in, for example, paying a switchboard operator less than a parking lot attendant, or paying a hospital unit clerk with 17 years experience less than an orderly with one year's experience, where the work is of equal or comparable value.

Gender Neutrality

A gender neutral process of job comparison examines the skill, effort, and responsibility **required to do the job**, as well as the working conditions of the job, regardless of whether men or women traditionally do the work.

Test Yourself For Awareness of Gender Bias

The following exercises allow you to test your awareness of gender neutrality.

What's Wrong Here?

Exercise 1: Examine this sample question from a questionnaire.

This question asks employees in a company with both plant and office jobs to check off all pieces of equipment they use in their jobs. The pieces of equipment are:

___ Drill press
___ Lathe
___ Table saw
___ Car
___ Forklift
___ Other (please specify)

This sample question lists equipment which would be used in jobs traditionally done by men. There are **no** illustrations for equipment for jobs done by women such as wordprocessor or sewing machine.

Exercise 2: Examine this description of working conditions.

Here are descriptions of working conditions for two jobs within the same establishment:

JOB TITLE: METER READER

- Outside in all kinds of weather
- Walking from house-to-house, including up and down stairs
- Potential danger from dogs and from other hazards when entering homes

JOB TITLE: PUBLIC HEALTH NURSE

- Driving from location to location
- Interacting with ill people

These descriptions do **not** show consistency in the amount of detail about working conditions. The public health nurse encounters danger from entering others' houses just as meter readers do. For both jobs, there is missing information. For example, the Public Health Nurse is required to interact with people who may have a communicable disease, or who may be volatile, placing the nurse in a work situation which could endanger health or life.

Exercise 3: Examine this description of effort:

Here is a list of subfactors in a job comparison system which define effort:

- Lifting requirement
- Strength requirement
- Sustained physical effort

The subfactors listed above only deal with **physical** effort, traditionally associated with men's jobs. Further, there is no subfactor to measure mental effort which would balance the factor or make it gender neutral. The physical effort subfactors tend to overlap in this list giving extra value for the same type of effort.

Why have women's jobs been undervalued?

Undervaluing jobs done mostly by women arises from:

- overlooking job content, particularly if it is associated with women's traditional roles such as caregiving and communicating with difficult or ill people

- not recognizing levels of disagreeable elements and stress in working conditions, for example a telephone operator/receptionist works with little choice of movement, is in the same body position all day, is restricted by a headset wire, and has continual interaction with the public, some of whom may be hostile or abusive

- undervaluing skills, such as the physical dexterity and the complexity of the skills involved in word processing, and the proofreading and editing involved in retyping documents.

Check for Gender Neutrality

Gender bias can creep into the process at any step. Be careful to watch for it while:

- Selecting and training the job comparison committee

- Selecting the job comparison system, defining its subfactors and deciding upon the weighting

- Collecting job information

- Applying the system of job comparison

See Resources chapter page 213 for gender neutrality materials

JOB

INFORMATION

COLLECTING JOB INFORMATION AND WRITING A JOB INFORMATION STATEMENT

Why Job Information is Needed

For pay equity purposes, complete, accurate and up-to-date information about jobs, collected in a gender neutral way, is needed to:

- identify job classes according to the Act's criteria
- guide the selection, definition and weighting of the factors and subfactors of the job comparison system
- compare jobs on the basis of their skill, effort, responsibility and working conditions.

Collecting and Setting out Information about Jobs

In collecting and setting out information about jobs you may proceed in one step or in two steps.

In **both** cases, the first step is to **collect** information from employees, usually with a questionnaire and/or a follow-up interview. If you use a one-step process, you will compare jobs using the questionnaire results **and** notes from any interviews, as your source of information.

The questionnaire in this workbook on page 148 is written to accompany the Adaptable Twelve Subfactor Point System, and allows job comparison to be done directly from a completed questionnaire. If you use either the Paired Comparison Ranking System or the Basic Point Factor System, you will need to develop a questionnaire to fit these systems. An outline of a process to develop a questionnaire starts on page 31.

In the two-step process, described in Chapter One of How to do Pay Equity Job Comparisons, the second step is to rewrite the information about jobs which you have collected into a job information statement, or a job description. There are four examples of job information statements, written to fit with either the Basic Point Factor or the Paired Comparison Ranking systems, starting on page 40.

In either case, your objective is a gender neutral process for collecting and recording job information. As well, your objective is to be consistent throughout the organization in the amount of detail used to describe jobs, and to be consistent in your use of words to describe jobs. Designate an individual, or make the job comparison committee responsible for gender neutrality and for consistency. The committee should request changes if it is not satisfied with the information given to them.

Be sure the questionnaire used fits the system you have chosen to compare jobs, and that both fit your jobs. Test and screen the questionnaire. See page 36.

The Implementation Checklist on page nine, suggests one way to proceed with collecting and setting out job information:

1. Use current job titles, descriptions and knowledge of jobs to make your best estimate of the number of female and male job classes in the organization. This information is also useful in selecting the job comparison system which is the best fit with your organizational values and jobs.

2. Use the questionnaire which comes with the Adaptable Twelve Subfactor Point system, or develop a questionnaire to fit any other system you have chosen. Screen and test the questionnaire.

3. Make any necessary revisions to the questionnaire. Use it to collect information on all job classes to be compared. Use follow up interviews as needed. If you use the two-step process, write job information statements. Ensure that employees are satisfied the information is complete and accurate.

4. Use this information to check that all job classes are properly identified.

5. Use this information to compare jobs.

The following chapter discusses collecting and recording information about jobs for pay equity requirements only. However, employers **may** wish to collect additional information to write complete job descriptions which can be used for the following purposes:

- to recruit and to promote
- to identify reporting and supervisory relationships
- to set a standard for employee evaluation and for use in grievance procedures
- to identify essential occupational requirements for employment equity purposes

Job Information in Small Workplaces

Uniqueness of Each Job:

In a small workplace, chances are many jobs will be filled by only one person. This makes it difficult, when collecting job information, to separate your opinion of the person in the job from the job requirements.

It may help if you think about job content as if you are setting up a new workplace and have to consider what work is needed to carry out your business or service.

Employees Filling in for Each Other:

In a small workplace, employees frequently fill in for each other, often for short times daily. Job information statements focus on the job's **essential** duties. However they also should include a description of additional duties such as filling in for others, the amount and the frequency of these duties, and the flexibility and skills required to perform them. Then the complete job requirement can be evaluated.

Employees Who Do Many Different Tasks:

In many small workplaces, one employee has a variety of responsibilities or tasks which in a larger organization would be assigned to a number of different jobs. These tasks may call for very different levels of skills, and the employee must be credited for each.

One employer solved this problem by identifying each task that was part of the position.

For the position of Clerk:

Task 1	Bookkeeper	31% of time
Task 2	Correspondence secretary	31% of time
Task 3	Recording Secretary	7% of time
Task 4	Zoning Planner	31% of time

Job information was collected for each task, and each task valued separately. The value was multiplied by the percentage of time spent on the task, resulting in a total value for the job class.

DEVELOPING A QUESTIONNAIRE

Consider including in your questionnaire both questions that are open-ended, in which employees have a chance to explain their jobs, and closed-ended, in which employees are given a choice of answers, with the instruction to "check off" the answer that applies. Here are some guidelines for developing a questionnaire.

A. Write An Opening Statement

An opening statement can make employees feel comfortable about completing the questionnaire, reassure them about its purpose, and inform them of a contact person if they have questions.

Illustration of opening statement:

> The purpose of this questionnaire is to gather information about the duties, responsibilities, skills and effort involved in your job, and its working conditions. The questionnaire is concerned with the requirements of the job, not with individual performance. The results will be used to compare jobs in this organization for pay equity purposes.
>
> Please take the time to provide complete, accurate and up-to-date information about your job. Please write or print clearly. If you have any questions contact _____ at telephone number _____.
>
> If you need more space to complete your answer, indicate that you are continuing on another page(s), and be sure to attach it. If you wish to add any other information about your job that is not asked for in this questionnaire, use an extra page and be sure to attach it.
>
> We want to make sure your job is completely and accurately described and appreciate your co-operation and support.

B. Specify The Job Title, Date, Job Summary and Job Duties

The job title and job summary are included to identify the job and its purpose in the organization. This, and the following summary of job duties, help to focus the employee's mind on the essential elements of the job, making it easier to think of the necessary skills and efforts required.

Note: If the job calls for regular filling in for others, including managers or supervisors, or if special tasks are done infrequently, the skills required for this extra work should be recognized.

Illustration of job title, job summary and duties:

JOB TITLE **DATE**

JOB SUMMARY

Write two or three sentences summarizing the purpose of your position. You may wish to fill this in after you have completed the rest of the questionnaire.

JOB DUTIES

Please list the five or six major duties or elements of your job. Briefly explain what is required, how it is done, and why it is done. Indicate the approximate percentage of time you spend on each duty in the course of a normal year.

DUTY **TIME**

OTHER DUTIES

Briefly describe other duties. Include duties performed when you are required to fill in for others. Also include duties which may only occur at certain times of the year, or special projects you have undertaken in the past year. Indicate the amount of time required for the duties.

C. Analyze Factors In Job Comparison System You Have Selected To See What Information Is Needed To Compare Jobs On The System -- Then Write Questions

The Act requires that employers and unions compare jobs using the factors of skill, effort, responsibility and working conditions. Employers decide or negotiate with unions how to define, and weight these factors. See Exercises 1, 2, 3 and 4, starting on page 70, for a process to choose factors and weights.

Illustration of factor definition for skill from the Basic Point Factor system :

> SKILL: This factor measures skills such as analytical, communication, computer, computational (using numbers), creative, interpersonal, financial, mechanical, mental, motor, organizational, problem-solving and other skills whether acquired by education, training or experience, which are required to perform the duties of the job.

After the factors are defined, they are analyzed. Information has to be gathered so that jobs can be compared using the factors. For example, the above definition of skill calls for information on the education, training and experience required to do the job.

It also requires information on how the skill is being used in order to identify the **level** of the skill needed to do the job. The higher the level of skill requirement, the higher the job will score. For example, when rating computer skills, the requirement to write computer programs calls for a higher level of computer skills, and so would score higher than the job of inputting data.

Illustration of questionnaire item to collect information for the above definition for skill:

SKILL:

(a) Education and Training

Place a check mark opposite the line which best describes the minimum level of education **required** to do the job after normal training, and under normal supervision. (**Note:** This may be more or less than the education you or the previous employee doing your job has, rather than what is **required** for the job.)

( ) less than Grade 10
( ) Grade 10 to some Grade 12 subjects
( ) Grade 12 graduation
( ) less than Grade 12 plus a special program
Describe program:

( ) Community College - 1 year program
( ) Community College - 2 year program
( ) BA
( ) Other university degree
Describe program:

( ) Is there any provincial or vocational certification or license, registration or permit **required** for your job?
Describe:

( ) Is there any professional certification or license <u>required</u> for your job?
Describe:

( ) Are there other training courses or other qualifications <u>required</u> for your job (including high school courses) which are not described above?
Describe:

(b) Knowledge

Place a check mark opposite one or more of the skills listed below which are required for the job. The knowledge may have been learned by education, training or experience. Add any other skills not listed, but which are needed to do the job. Below each check mark you make, explain how the skill is used, and in the space provided show the period of time you use each skill.

Example: Computer skills to input data on physical inventory (3 hours monthly), to run a computer program for inventory control and to produce a monthly report (2 hours monthly).

	Skill:	**Time:**
( )	analytical	
( )	communication - written/oral	
( )	computer	
( )	computational (using numbers)	
( )	creative	
( )	interpersonal	
( )	financial	
( )	mechanical	
( )	mental	
( )	motor	
( )	organizational	
( )	problem-solving	
( )	other	

D. Screen and Test the Questionnaire

Screening and testing takes place to ensure that the questionnaire measures what it is supposed to measure and that it provides consistent results across the organization.

Screening:

Screen the questionnaire to be sure it collects complete, accurate and up-to-date information for both female and male job classes. Ask yourself if the examples and illustrations refer to **both** female and male jobs? For example, if equipment is listed, does the list contain equipment commonly used in **both** female and male jobs?

Screen the questionnaire to be sure it will collect commonly overlooked job information. In the past, jobs mostly done by women have been undervalued in part because the amount of skill and the length of time to acquire the skill have been underestimated. Disagreeable working conditions have often been overlooked. Sometimes descriptions have been too general and miss important information. The following list contains examples of information which has been frequently overlooked.

Illustration of Commonly Overlooked Job Information:

Skill:

- Operating and maintaining several different types of office, manufacturing, treatment/diagnosis or monitoring equipment
- Manual dexterity required for giving injections, typing or graphic arts
- Writing correspondence for others and proofreading and editing others' work
- Establishing and maintaining manual and automated filing systems, or records management and disposal
- Training and orienting new staff
- Deciding the content and format of reports and presentations to clients

Effort:

- Adjusting to rapid changes in office or plant technology
- Concentrating for prolonged periods at computer terminals, lab benches and manufacturing equipment
- Performing complex sequences of hand-eye co-ordination in industrial jobs
- Providing service to several people or departments and working under many simultaneous deadlines
- Developing work schedules

Responsibility:

- Providing emotional support to patients, children or institutionalized people
- Protecting confidentiality
- Acting on behalf of absent supervisors
- Representing the organization through communications with clients and the public
- Supervising staff
- Shouldering consequences of error to the organization
- Preventing possible damage to equipment
- Co-ordinating schedules for many people

Working Conditions:

- Stress from noise in open spaces, crowded conditions and production noise
- Exposure to disease and stress from caring for ill people
- Dealing with upset, injured, irate or irrational people
- Cleaning offices, stores, machinery or hospital wards
- Frequent bending and lifting of office or medical supplies, retail goods, injured or sick people, or children
- Stress from answering complaints
- Long periods of travel and/or isolation

Testing:

Test the questionnaire to be sure you are getting consistent results. Choose a sample of both female and male jobs at different levels of the organization, and ask employees in these jobs to complete the questionnaire. Then compare jobs using your job comparison system.

If you are using the two-step process, write draft job information statements using the questionnaire results. See the following page for Step 2: Writing job information statements. Use the draft statements to compare these jobs on your job evaluation system.

This testing may reveal that some questionnaire items are unclear, or collect complete information for some jobs but not for others. Details may be missing for some factors. As well, the testing may reveal that some factor definitions need revision. Interview employees who completed the questionnaires to get their feedback. Revise, and if necessary test again.

E. Educate Employees on How to Complete Questionnaire --- Administer the Questionnaire

Train employees on the importance of providing complete and accurate information. Be sure they have the time needed for completion, and know who to contact with questions. You may wish to inform them of the factors on which jobs will be evaluated.

F. Follow-up Interviews

Review the final questionnaire results to look for a consistent level of information from all employees and departments. Use follow-up interviews to collect any missing information. Use these interviews as well to record other information the employee considers important, and to obtain employee agreement that the final information is a fair description of the job. Supervisor and/or manager agreement may also be requested.

WRITING A JOB INFORMATION STATEMENT
(or Job Description)

The job information statement is step two in the two-step process of collecting and setting out information about jobs. The statement is based on information collected from employees by questionnaire and/or interview, and ranges from a list of tasks and duties and the skill, effort, responsibilities and working conditions of the job, to a more formal job description. The job comparison committee uses this information to compare jobs.

Be sure employees are satisfied that the job information statements fairly describe their jobs. You may ask them and their supervisors to sign off on these statements. Provide a process to resolve any disagreements.

How to do Pay Equity Job Comparisons, pages 12 to 18, list nine steps in writing job information statements, which emphasize providing a clear understanding of:

WHY the job is done	Job summary: primary purpose of the job
WHAT is done	Major duties & responsibilities Secondary duties & responsibilities Other duties
HOW it is done	Supervision given and received Machines and work aids used
JOB SPECIFICATIONS/ REQUIREMENTS	Skills, effort and qualifications needed for the job, and the working conditions under which the job is carried out

The following pages contain four examples of job information statements, written to be consistent with the factors in the Basic Point Factor and the Paired Comparison Ranking Systems in this book.

SAMPLE JOB INFORMATION STATEMENTS
FOR PAY EQUITY PURPOSES

Job information should reflect the factors and system to be used for job comparison. Each job information statement should be tailored for the unique job classes in each workplace.

The format of the following job information statements is consistent with the basic and paired comparison systems presented in this workbook.

TITLE: **SECRETARY II** **08/18/90**

JOB SUMMARY: Performs full clerical, administrative and general office duties for Marketing and Sales Manager and Distribution Manager: assesses incoming correspondence and calls for priority attention; maintains computer and manual files; organizes quarterly conferences; prepares routine correspondence and managers reports; designs and produces materials using desktop publishing; trains and orients support staff on office procedures; arranges travel.

SKILLS/KNOWLEDGE/EXPERIENCE required to perform the job:

- Clerical and administrative skills acquired in a two year community college secretarial course, or through equivalent work related experience
- Computer skills in two systems of wordprocessing and spreadsheets in order to compose, edit and produce correspondence, memos, tables and reports; skills in desktop publishing to produce advertisements for new staff, booklets, newsletters and information sheets for own and other departments
- Organizational skills to provide secretarial service to two managers with diverse and potentially conflicting requirements: for example to ensure that materials, files, reports and equipment are available to the manager, and that follow up clerical and administrative work is completed; to clarify priorities and modify schedules on demand; to maintain records, mailing lists, computerized and manual files; to schedule appointments and meetings; to arrange travel; to arrange quarterly conferences for thirty people including liaison with hotel and catering services for accommodation, meals and special needs, to advise participants of arrangements and to send out follow up reports; to order and maintain inventory of office supplies; to arrange for temporary staff as required; liaison with office equipment service representatives for repair of office equipment

- Written communication skills to prepare routine internal and external memos and correspondence from dictation and from manager's notes. Knowledge of spelling, punctuation and grammar to proofread and edit work of managers. Report preparation includes locating missing information, checking and verifying information
- Interpersonal skills to maintain smooth functioning of support staff team including sharing work overload; to screen calls, letters and visitors for managers; to deal with or refer complaints from public
- Motor skills to operate switchboard, word processors, electric typewriter, dictaphone, photocopier, fax machine and desktop publishing machine, and to carry out routine maintenance
- Analytical skills to assess incoming correspondence, calls, visitors and complaints for personal attention, for referral, and for priority in bringing to the attention of managers. Maintains task and bring forward files, brings relevant materials and files to managers' attention as needed
- Creative skills to design format of various projects on desktop publishing equipment
- Teaching skills to train and orient new receptionist, word processor operator and data entry clerk in office procedures
- Mathematical skills to prepare managers' travel claims and maintain and order inventory
- Knowledge of equipment listed above under motor skills; typing at 60 w.p.m., dictaphone including technical vocabulary at 60 w.p.m., word processing at 80 w.p.m., data entry at 8000 key strokes p.h.; knowledge of company and department policies and operations required to priorize as described in analytical skills

MENTAL EFFORT required to perform the job:

- Mental and visual concentration during computer work four to five hours daily, for accuracy in entry, editing and design
- Listening and mental attentiveness in dealing with customer or public queries, and manager requirements

PHYSICAL EFFORT required to perform the job:

- Performs complex sequences requiring manual dexterity, speed and hand-eye co-ordination when using office equipment, in particular word processor and desktop publisher, four to five hours daily
- Lifts and shelves office supplies (up to 30 pounds) daily
- Arranges and cleans up meetings rooms (e.g.: chairs, tables, ash trays, coffee cups)

RESPONSIBILITIES associated with performing the job:

- Responsible for clerical and administrative support for two managers
- Error regarding work could result in delays, duplication of effort, annoyance, embarrassment to managers and others, and unfavourable public relations
- Completes and maintains copies of travel claims
- Maintains financial records of expenses for conferences, travelling expenses, and petty cash
- Manages the office in the managers' absence for example by distributing work to other staff members, making phone calls and re-directing enquiries and correspondence to others
- Maintains confidentiality
- Supervision/Direction:
  Given:
  - Assign work to word processor and data entry operators in managers' absence

  Received:
  - Reports to Marketing and Sales Manager and Distribution Manager
  - Within established guidelines plans own work schedule, adapts to priorities and deadlines

WORKING CONDITIONS while performing the job:

- Works in climate-controlled office area with recycled air
- Works in confined space of four-feet high, minimum-grade baffled privacy station
- Required to sit for extended periods of up to five hours daily, holding hands and lower arms horizontally while working at word processor and other office equipment
- Works to frequently simultaneous deadlines, with conflicting priorities due to reporting to two managers
- Works with frequent interruptions, both in person and by telephone
- Works with high noise level of own printer, printers from other stations, conversations, phones and typewriters, and fax machines
- Concentration on VDT screen for up to five hours daily

TITLE: MARKETING CO-ORDINATOR 08/18/90

JOB SUMMARY: Co-ordinates the promotion and advertising of security systems manufactured by suppliers and distributed by the firm at trade shows, seminars and training schools; prepares for and co-ordinates the above shows; analyzes projected and current sales and inventory data and produces computerized reports; manages special projects; oversees the production of the firm's catalogue of security systems; recruits, orients and trains Marketing and Sales Department support staff; supervises department support staff.

SKILLS/KNOWLEDGE/EXPERIENCE required to perform the job:

- Marketing, communications, analytical reporting, and human resources skills and knowledge, acquired in a two-year community college sales and marketing program or through experience
- Organizational skills to prepare for, co-ordinate and ensure smooth functioning of firm booths at trade shows; to organize training schools and seminars to demonstrate suppliers' products which includes agenda, travel arrangements, booking site, accommodations and materials; and to co-ordinate telemarketing and advertising of special projects to achieve increased sales
- Project management skills to oversee production of the firm's catalogue which includes liaising with suppliers to acquire appropriate materials specified by printer and with production house to ensure production of catalogue within time and budget constraints
- Interpersonal skills in communicating, negotiating, selling and counselling for customer service; for overseeing production of firm's catalogue; for liaising with suppliers; for support staff interviewing, hiring, training and supervising; and for maintaining an effective working environment
- Computer skills in word processing and spreadsheet (Lotus) to compile data and present sales analysis reports for suppliers, and sales and inventory reports for firm; to maintain daily inventory of trade show products, and yearly Christmas promotional programs; skills in desktop publishing to produce flyers and sales materials
- Analytical skills to prepare above reports and projected and current sales and inventory reports, evaluation of trade shows, results of advertising campaigns and complaints reports

- Knowledge of product lines and servicing methods of suppliers' products, distributed by the firm, to provide information inside and outside of organization; includes preparing quotations and responding to sales and service questions
- Creative skills to do media search
- Teaching skills to conduct new employee orientation in telephone usage and in-house equipment
- Budgeting skills to prepare and monitor budget for position responsibilities
- Written communication skills for report summaries and for advertisements for support staff
- Valid driver's license and safe driving record
- Motor skills to operate word processor, photocopier, fax machine, desktop publisher, and to drive car

MENTAL EFFORT required to perform the job:

- Concentration during computer work for accuracy regarding sales analysis reports for average of two hours at VDT, daily
- Listening and mental attentiveness in dealing with supplier and customer concerns/complaints and documenting same, and in training support staff
- Mental attentiveness in preparing reports

PHYSICAL EFFORT required to perform the job:

- Lifting and carrying for up to one hour while loading and one hour unloading written materials and products when setting up for schools, trade shows and seminars, loads of 30 to 50 pounds, bimonthly
- Repeated use of wrist and arm for minimum two hours at VDT, daily
- Walking to shipping area approximately one-quarter mile one way, one trip daily
- Manual dexterity, speed and hand/eye coordination for work at computer and desktop publisher

RESPONSIBILITIES associated with performing the job:

- Co-ordinates the promotion and advertising of supplier's products, which includes contacts with suppliers, customers, sales staff, media and advertising agency, within general policy framework and precedents
- Errors in catalogue or poor interpersonal relations with above contacts have potential for embarrassment andloss of business to firm

- Maintains confidentiality regarding new product information
- Acts as Marketing and Sales Department manager for a full day, twice monthly, in the absence of manager
- Reviews applications, conducts interviews and makes hiring decisions for department support staff
- Prepares and discusses quarterly performance evaluations of support staff, and practices progressive disciplinary procedures
- Ensures expenditures for position responsibilities are contained within budget
- Supervision/Direction:

  Given:
  - Establishes and assigns work to support staff
  - Acts as working supervisor when workload is excessive

  Received:
  - Determines own schedule and activities within general policy framework and precedent
  - Reports to Department Manager weekly (minimum) about sales and complaints reports, and biweekly on other responsibilities
  - Involves Department Manager only in extremely difficult situations (normally handles on own)

WORKING CONDITIONS while performing the job:

- Works in climate-controlled office area with recycled air
- Works in maximum-grade baffled privacy station
- Works with high-noise levels due to volume of telephone traffic in department and pitch of voices dealing with customer sales calls
- Receives up to 30 telephone calls daily and deals with a large variety of problems and customer complaints with often difficult/emotional discussions
- Works with frequent interruptions
- Works with simultaneous deadlines to prepare reports, expedite shipments, co-ordinate schools, etc.

* * *

TITLE: **SERVICE TECHNICIAN/INSTALLER** **08/18/90**

JOB SUMMARY: Installs, services, inspects and advises regarding electronic security systems.

SKILLS/KNOWLEDGE/EXPERIENCE required to perform the job:

- o Electronic, schematic and blueprint reading skills and knowledge, acquired in a two-year electronics technician community college course or through experience
- o Knowledge of security system equipment and materials including camera, film and closed-circuit television components, which are distributed by the firm from various security system suppliers, for assembly
- o Motor and mechanical skills to drive a car and to install, test and service systems; for example:
  - . Pulling cable to different locations
  - . Hooking components up (such as card readers and cameras)
  - . Wiring electrical circuits and wire pulling to make electrical connections
  - . Using hand and power tools and testing equipment such as hammer, cutter, pliers, screwdriver, drill, soldering iron, oscilloscope, test meter and conduit bender
- o Computer skills for basic programming, using DOS language, to enter customer data into computer-controlled access control system and to program
- o Analytical skills to read and interpret blueprints (reviewing design/installation drawings to determine what materials and procedures are required for installation)
- o Interpersonal skills to clarify problems, and to secure and provide information to customers and suppliers regarding the installation, testing and servicing of security systems
- o Written communication skills to complete forms
- o Organizational skills to order and assemble materials for installation and to schedule site visits
- o Mathematical skills equivalent to a grade 12 education
- o Valid driver's license and safe driving record

MENTAL EFFORT required to perform the job:

- Concentration during installation, testing and servicing procedures
- Close attention to work during installation, testing and servicing to ensure correct and safe procedure

PHYSICAL EFFORT required to perform the job:

- Pulls cable through buildings
- Operates daily medium-weight to light-weight hand (such as a hammer) and power tools (such as a drill)
- Climbs a ladder, may be higher than 30 feet, minimum three days per week
- Lifts heavy equipment (up to 50 pounds), several times daily (may combine climbing and carrying)
- Dexterity for installation and testing procedures (fine motor skills concerning electrical connections)
- Repeated action of arm, wrist and fingers in some testing procedures

RESPONSIBILITIES associated with performing the job:

- Responsible for handling, installing and testing both mechanical and electrical security systems
- Error in installation, testing and servicing has potential for loss of business to company due to customer dissatisfaction
- Provides supervisor with recommendations/solutions to keep systems operational
- Takes company vehicle for regular servicing/repair to ensure safe operation
- Ensures equipment and materials are securely stored in company vehicle (theft prevention)
- Supervision/Direction:

  <u>Given</u>:
  - None

  <u>Received</u>:
  - Reports to Supervisor
  - Plans own weekly installation/testing/servicing schedule, some priorities set by supervisor
  - Follows well-defined work procedures, solves routine problems; calls supervisor to discuss problems with installation/testing
  - Submits handwritten reports to supervisor concerning completion of assigned tasks (type of system, length of time concerning installation, follow up testing date)
  - Responds on own to emergency situations (10% of week), may require assistance of supervisor

WORKING CONDITIONS while performing the job:

- Works up to 70% of the time in non-climate controlled environment
- Some outdoor work required to check relay to outside alarm
- Stands, up to four hours daily
- Works in confined space, awkward positions (below floors, air-conditioning ducts, inside machines), minimum three days per week
- Works in spaces and with used equipment which may be dirty
- Sits, may be longer than two hours, while driving company vehicle, minimum three days per week out of office
- Encounters occasional heated customer complaint with equipment or service

* * *

TITLE: STORESKEEPER 08/18/90

JOB SUMMARY: Receives, categorizes, stows and maintains incoming products from suppliers; issues and ships outgoing products; assembles, issues and checks return to stores area of small tools and equipment

SKILLS/KNOWLEDGE/EXPERIENCE required to perform the job:

- Organizational skills to ensure:
  - that incoming shipments are checked against purchase order and for damage
  - that materials are entered on inventory files
  - that materials are retrieved from storage when needed, packaged and shipped according to requisition form
  - that documentation is filed daily upon completion of orders (requisitions, purchase orders)
  - that materials are shipped as requested
  - that small tools and equipment distributed to employees are monitored
  - that all store materials are monitored and/or locked away to prevent theft
- Written communication skills to maintain records of incoming and outgoing stores and equipment
- Motor and mechanical skills to operate material handling equipment, both manual and automated, in connection with the receiving, stowing and shipping of materials and equipment (four-wheel dolly, two-wheel upright dolly, forklift; requires one-week safe operator certificate); and to maintain equipment (weekly safety check, adds oil and gas); to operate automated floor cleaner; and to package materials for shipping
- Interpersonal skills in communication for interacting with drivers making deliveries and with employees requiring equipment
- Computer skills to input data on physical inventory (three hours monthly), to run a computer program for inventory control and to produce a monthly report
- Mathematical skills (adding, subtracting, dividing, multiplying)
- Caretaking skills to maintain clean and safe stockroom area including sweeping (daily) and floor cleaning (monthly)
- Knowledge of all types of equipment and firm products, forms and procedure for issuing, shipping and returning tools, equipment and products
- Teaching skills to train picker/packer in storesroom procedures

MENTAL EFFORT required to perform the job:

- Hearing and visual concentration when operating automated equipment such as forklift and floor cleaner to avoid injury to self or others, and during data entry on computer
- Close attention to detail regarding materials inventory and correct reading of purchase orders

PHYSICAL EFFORT required to perform the job:

- Requires lifting of materials, usually between 20 and 50 pounds, three times hourly (maximum lifting height, six feet) to load and unload dolly; forklift assists with loading and unloading skids onto floor area
- Requires manual dexterity and hand-eye co-ordination for data entry (speed not essential), three hours per week

RESPONSIBILITIES associated with performing the job:

- Ensures that supplies, materials, equipment and small tools are checked upon receipt, categorized, stored, issued and shipped as required
- Reports shortages or obsolescence of parts to supervisor to facilitate re-purchase or disposal (monthly)
- Error in reporting shortage of materials or incorrect filling of orders has potential for customer dissatisfaction and some loss of business
- Provides information (oral) to supervisor (weekly) concerning the performance of trucking companies (information facilitates yearly contract renewal)
- <u>Supervision/Direction:</u>
  <u>Given</u>:
  . None
  <u>Received:</u>
  . Reports to supervisor
  . Follows daily, weekly and monthly schedule of duties set by supervisor
  . Follows well-defined work procedures set by supervisor, solves routine problems, refers situations not covered by precedent to supervisor

WORKING CONDITIONS while performing the job:

- Works in the plant area 90% of time daily (heat but no air-conditioning);
- Works outside (one hour daily) to take materials to outside storage area (can avoid if inclement weather); works exposed to outdoor temperature when loading and unloading materials
- Works in climate-controlled office (three hours per week) to prepare inventory reports
- Sits (forklift), three to four hours daily
- Works with noise of forklift and other equipment while loading and unloading
- Responds to several requests simultaneously for incoming or outgoing materials
- Frequent daily interruptions
- Responds to heated or emotional requests for service (occasionally)

* * *

JOB COMPARISON SYSTEMS

FOR UP TO 20 JOBS

JOB COMPARISON SYSTEMS FOR UP TO 20 JOBS

The Pay Equity Act, 1987 requires you to compare job classes on the basis of skill, effort, responsibility and working conditions, using a job comparison system which is gender neutral. Small workplaces, or large workplaces with only a few female or male job classes to compare, may choose to use a simple or basic job comparison system.

Whatever job comparison system you choose be sure to check for gender bias at every stage of the job comparison process: choosing a job comparison committee; collecting information about jobs; choosing, defining and weighting factors; and comparing jobs.

To use the information in this chapter effectively, refer to Implementation Series #9: Gender-Neutral Job Comparison, and How to Do Pay Equity Job Comparisons.

Some terminology you will need to know:

- factor (or criteria) -- refers to skill, effort, responsibility and working conditions
- subfactor -- refers to a subdivision of one of the four factors; for example, "experience" and "interpersonal skills" are two possible subfactors of skill
- level -- refers to degrees of the subfactor; for example, the subfactor education could be divided into the following five levels:

  1. less than grade 10
  2. high school graduation
  3. community college or two years of university
  4. university graduation
  5. postgraduate degree

Two examples are provided in this chapter to illustrate basic job comparison systems: the Paired Comparison System, suitable for up to eight to ten jobs, and the Basic Point Factor System, suitable for up to 15 to 20 jobs. A third system, The Adaptable Twelve Subfactor Point System is suitable for any number of jobs. It can be found starting at page 85.

The Pay Equity Commission does not recommend or endorse any job comparison system.

PAIRED COMPARISON RANKING SYSTEM

In a Paired Comparison Ranking System, each job class is ranked against all other job classes on the basis of skill, effort, responsibility and working conditions.

The number of times each job class is ranked higher than another job class is counted. From this, a ranking or hierarchy of job classes in the organization from top to bottom results. Then comparable job classes can be identified.

The system is suited for up to eight to ten jobs. Beyond this it becomes unwieldy.

Steps

1. Select and train the job comparison committee

   See pages 21-22 and 32-33 in How to Do Pay Equity Job Comparisons.

2. Define the factors

   Define the factors of skill, effort, responsibility and working conditions to reflect the work, and the jobs, in your workplace. Mental and physical effort are best defined separately. To modify factors to fit your workplace see Exercises 1 and 2 starting on page 72.

3. Weight the factors

   Weighting may be incorporated into this ranking system. For example, if you decide that skill should be considered to be twice as important as working conditions, you can multiply the rank awarded to a job for skill by two. If you decide that effort and responsibility should be considered to be three times the value of working conditions, you can multiply the rank awarded to a job for effort, and for responsibility, by three. See Exercise 3, page 79, for a process to choose factor weights for the paired comparison ranking system.

4. Collect or revise job information

Collect complete, accurate and gender-neutral information about each job class, presenting it in a consistent format. Be sure the information you collect corresponds to the factors you use.

5. Compare job classes

List the job classes in alphabetical order on each page of the ranking forms, pages 59, 60 and 61.

Discuss each factor's definition to ensure that committee members have the same understanding.

The committee members study the job information presented to them, then rank each job class against each other job class on the first factor, **one pair of job classes at a time.** Work across the row.

In the example on the next page, job class A (Buyer) was compared to job class B (Executive Assistant). Job class A (Buyer), ranked higher in skill, so an A was placed in the row, under column B. Job class A was then compared to job class C (Janitor) and found to require greater skill, so A was recorded under column C.

Next, job class B is ranked. B had already been compared with A, and B cannot be compared against itself, so an "X" is recorded across from B in both columns A and B. Job class B (Executive Assistant) was seen as requiring more skill than job class C (Janitor), so a B was recorded under column C.

Then, job class C was examined. It had already been compared to A and to B, and cannot be compared against itself, so an "X" was recorded across from job C under columns A, B and C.

It is possible to decide that two job classes have the same value, that neither is higher ranked. If this happens, record both: example, A/B.

Illustration of Comparison Results for Skill:

	JOB CLASS	A	B	C	TOTAL TIMES RANKED HIGHER
A	BUYER	X	A	A	2
B	EXECUTIVE ASSISTANT	X	X	B	1
C	JANITOR	X	X	X	0

"X" indicates a previous comparison or a job compared against itself.

Each committee member then ranks all job classes on the next factor, and continues until all job classes have been ranked on all factors.

Discuss the results and reach consensus.

6. Calculate results for each job class

Give one point to a job class each time it is identified and listed as higher ranked anywhere on the chart. In the previous example, Buyer was ranked higher twice and Executive Assistant was ranked higher once.

If two job classes are found to be equal in value on one factor, give each job class half a point. Give half a point for each result for physical effort and half a point for mental effort.

If you chose to weight factors, see Exercise 3, step 5, page 80, to calculate weighted results.

7. Decide which jobs are comparable

Record your final results on the form on page 63. Start with the job class with the highest total.

Look at the job classes in the hierarchy. Do some appear to be closer in value than others? Draw lines separating groupings of job classes that appear to be of comparable value. For example:

Engineer
Librarian

Executive Assistant

Secretary
Receptionist

Clerk
Labourer

In this example, Labourer and Clerk are seen to be of comparable value. Secretary and Receptionist are of comparable value and higher in value than Labourer and Clerk and lower in value than Executive Assistant, etc.

Because the "points" given to job classes in this approach are really "rankings," there may **not** be a consistent spread of "ranking points" to indicate which job classes are comparable. Double check for gender bias by examining the placement of female and male job classes into separate groupings.

Paired Comparison Ranking Form

SKILL:

Factor definition: This factor measures the skills such as analytical, communication, computer, computational (using numbers), interpersonal, financial, mechanical, mental, motor, musical, organizational, problem-solving and other skills acquired by education, training or experience, required to perform the duties of the job.

JOB CLASS	A	B	C	D	E	TOTAL TIMES RANKED HIGHER	WEIGHT (IF ANY)	WEIGHTED RESULTS
A _____	X*							
B _____	X	X						
C _____	X	X	X					
D _____	X	X	X	X				
E _____	X	X	X	X	X			

PHYSICAL EFFORT:

Factor definition: This factor measures the amount of physical activity or effort (light, medium and heavy) and its duration. It includes the physical demands of co-ordination (such as hand/eye co-ordination), dexterity, exertion and speed.

JOB CLASS	A	B	C	D	E	TOTAL TIMES RANKED HIGHER	WEIGHT (IF ANY)	WEIGHTED RESULTS
A _____	X*							
B _____	X	X						
C _____	X	X	X					
D _____	X	X	X	X				
E _____	X	X	X	X	X			

*X indicates a previous comparison or a job compared against itself.

Paired Comparison Ranking Form Cont'd

MENTAL EFFORT:

Factor definition: This factor measure the amount of attentiveness or concentration (listening, mental or visual)and its duration required to do the job.

JOB CLASS	A	B	C	D	E	TOTAL TIMES RANKED HIGHER	WEIGHT (IF ANY)	WEIGHTED RESULTS
A _____	X*							
B _____	X	X						
C _____	X	X	X					
D _____	X	X	X	X				
E _____	X	X	X	X	X			

RESPONSIBILITY:

Factor definition: This factor measures the level of accountability for decisions, people contact, policy, quality, quantity, resources (financial, human and technical), results safety and health of others, and teamwork. It includes supervision given and received.

JOB CLASS	A	B	C	D	E	TOTAL TIMES RANKED HIGHER	WEIGHT (IF ANY)	WEIGHTED RESULTS
A _____	X*							
B _____	X	X						
C _____	X	X	X					
D _____	X	X	X	X				
E _____	X	X	X	X	X			

*X indicates a previous comparison or a job compared against itself.

Paired Comparison Ranking Form Cont'd

WORKING CONDITIONS:

Factor definition: This factor measures the frequency and degree of exposure to disagreeable elements in the physical or psychological environment. Examples include but are not limited to conflict, deadlines, disagreeable substances (such as fumes, grease and human "dirt"), health hazards, heat, inclement weather, interruptions, noise, physical danger, and confined or awkward working position.

JOB CLASS	A	B	C	D	E	TOTAL TIMES RANKED HIGHER	WEIGHT (IF ANY)	WEIGHTED RESULTS
A _____	X*							
B _____	X	X						
C _____	X	X	X					
D _____	X	X	X	X				
E _____	X	X	X	X	X			

*X indicates a previous comparison or a job compared against itself.

Job Comparison Results

Using the Paired Comparison Ranking System

(List job classes alphabetically and document the reasons for the assignment of rankings.)

JOB CLASS	SKILL	MENTAL EFFORT	PHYSICAL EFFORT	RESPONSIBILITY	WORKING CONDITIONS	TOTAL

Comparable Jobs Form

JOB CLASS HIERARCHY CHART

List job classes and total times ranked higher on the chart below, starting with the job class with the highest total.

JOB CLASS	TOTAL TIMES RANKED HIGHER

Identify Comparable Job Classes

Identify job classes close enough in value to be comparable by drawing lines separating the job classes which are similar enough in value to have the same job rate.

BASIC POINT FACTOR SYSTEM

In the Basic Point Factor System, each job class is valued on each of the four factors -- skill, effort, responsibility and working conditions -- and assigned a point value for each factor. The points are added together to determine the total value of the job class.

Job classes that fall within a specified point spread (the spread is determined by each organization) are identified as job classes of comparable value. This point spread can be likened to grades assigned to students who, for example, score from 80 to 89 points and are given a "B" grade - a spread of 9 points.

This system is useful for up to 15 to 20 jobs. Beyond this it does not adequately differentiate between jobs.

Steps

1. Select and train the job comparison committee

   See How to Do Pay Equity Job Comparisons, pages 21-22 and 32-33.

2. Define the factors

   Define the factors of skill, effort, responsibility and working conditions to reflect the work and the jobs in your workplace. In this job comparison system, each factor is defined in one paragraph, see page 67. Mental and physical effort are defined separately.

   To adapt factors to suit your workplace see Exercise 1, page 72, and Exercise 2, page 75.

3. Weight the factors

When job classes are valued on each factor using the same scale of one to ten, as in this system, all four factors have equal weight to each other, or each has 25% of the total weight of the system. If you wish to use this system but to weight the factors differently see Exercise 4, page 81.

4. Collect or revise job information

Collect complete, accurate and gender-neutral information for each job class and present it in a consistent format. Be sure the information you collect fits the factors you use.

5. Value job classes

List each job class in alphabetical order in the left-hand column of the form on page 68.

Be sure each committee member has the same understanding of the definition of each factor.

Using the job information collected, each committee member values each job class on the basis of skill and assigns it a score from a scale of one to ten. Then, each values responsibility, effort - physical and mental effort can be valued separately and the results averaged, and working conditions. Use a scale of one to ten to value all factors unless you are weighting the factors differently.

Add the points together to get the total point value of each job class.

An Illustration of one committee member's scores:

JOB CLASS	SKILL	EFFORT	RESPONSIBILITY	WORKING CONDITIONS	TOTAL POINTS
Electrician	5	5	5	5	20
Nurse	6	6	7	8	27
Painter	3	5	1	6	15
Receptionist	3	4	2	4	13

Compare the committee's scores for each job class. You can discuss one factor at a time if you wish, but be prepared to spend a great deal of time on the job evaluation process. Discuss differences and reach consensus.

6. Determine comparable job classes

List all jobs in the organization, starting with the job with the highest point value. Determine comparable job classes by establishing a range of points within which job classes are of comparable value. Comparable job classes will be paid the same. In this example, for unweighted results, job classes valued within a six-point spread might be considered comparable.

Factor Definitions for the Basic Point Factor System

SKILL:

This factor measures the skills such as analytical, communication, computer, computational or using numbers, creative, interpersonal, financial, mechanical, mental, motor, organizational, problem-solving and other skills whether acquired by education, training or experience, which are required to perform the duties of the job.

MENTAL EFFORT:

This factor measures the amount of attentiveness or concentration - listening, mental and visual, and its duration, required to do the job.

PHYSICAL EFFORT:

This factor measures the amount of physical activity - light, medium and heavy, and its duration. It includes the physical demands of co-ordination such as hand/eye co-ordination, dexterity, exertion and speed.

RESPONSIBILITY:

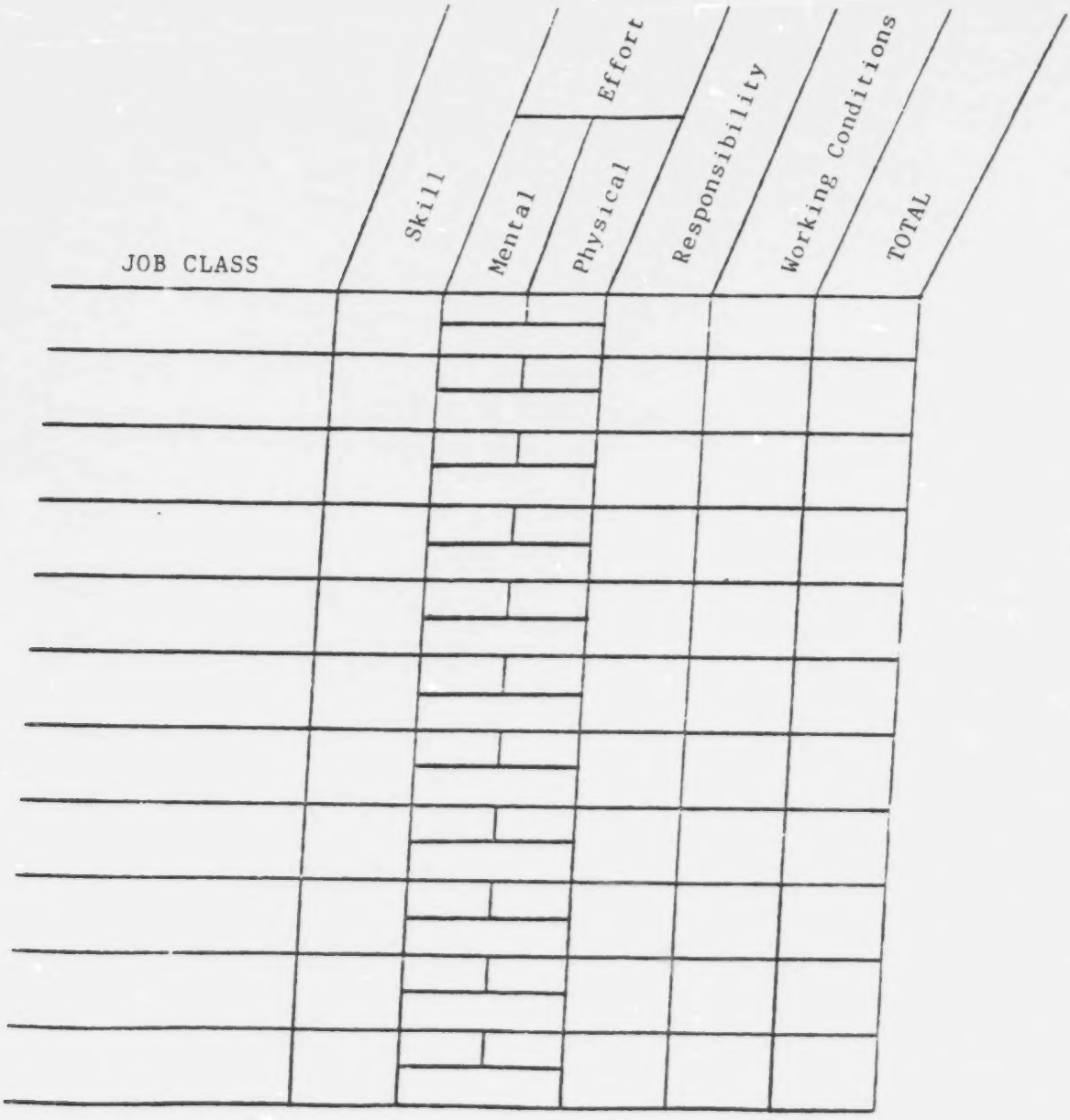
This factor measures the level of accountability for confidentiality, decisions, people contact, quality, quantity, resources (human, information, financial and technical), results, safekeeping, the safety and health of others, and teamwork. It includes supervision given and received.

WORKING CONDITIONS:

This factor measures the frequency and degree of exposure to disagreeable elements in the physical and psychological environments. Examples include conflict, deadlines, disagreeable substances (such as fumes, grease and human "dirt"), health hazards, heat, inclement weather, interruptions, noise, physical danger, and confined or awkward working position.

Job Comparison Results
Using the Basic Point Factor System

List job classes alphabetically and document the reasons for the assignment of point values to each job class.



Please Note: You can value mental and physical effort separately and average the result.

Comparable Jobs Form

JOB CLASS HIERARCHY CHART

List job classes and point totals on the chart below, starting with the job class of highest value and listing in order of value.

JOB CLASS	TOTAL POINTS

Identify Comparable Job Classes

Identify job classes close enough in value to be comparable by drawing lines separating the job classes which are similar enough in value to have the same job rate.

Job Comparison Exercises

To Adapt The

Paired Comparison Ranking System

And The Basic Point Factor System

To Your Workplace

JOB COMPARISON EXERCISES

TO ADAPT THE

PAIRED COMPARISON RANKING SYSTEM

AND THE BASIC POINT FACTOR SYSTEM

TO YOUR WORKPLACE

All job comparison systems contain **factors** for valuing jobs, **weightings** for these factors, and a **method** to compare jobs. It is essential that the factors and weights chosen are suited to your workplace. For example, sales and public relations skills might be good subfactors relating to skill for a company which sells advertising; communicating in a second language a may be a good subfactor for a firm which does translations -- but these subfactors might not be the best choices for some other workplaces.

Factors and weights, and the method to follow to compare jobs are decided by the employer, or where there is a union, are negotiated with the union. Exercises 1, 2, 3 or 4 may help an employer, or an employer and union, decide how to select or adapt factors and weights to suit the individual workplace. In Exercise 5 you choose a method from one of the job comparison systems and use it to compare jobs. This familiarizes you with the process of job comparison.

Exercise 1	P. 72	Choosing Subfactors to Suit Your Workplace
Exercise 2	P. 75	Adapting or Writing Subfactors
Exercise 3	P. 79	Choosing Factor Weights and Applying them to the Paired Comparison System
Exercise 4	P. 81	Choosing Factor Weights and Applying them to the Basic Point Factor system
Exercise 5	P. 83	Comparing Jobs

Keep in mind, the exercises are written with the assumption that a job comparison committee will be comparing jobs. While this is not required by the Act, it is advised.

EXERCISE ON CHOOSING SUBFACTORS

The criteria or factors of skill, effort, responsibility and working conditions (and the subfactors used to describe them more precisely) should be defined to reflect the essential work of the organization -- its values and objectives -- and the work -- the duties and responsibilities -- of its employees. Where there are unions, these definitions are negotiated with the bargaining agent.

EXERCISE 1: **Choosing Subfactors to Suit Your Workplace**

1. Consider the values and objectives of your organization and the duties and responsibilities of the employees.

2. Refer to the lists on the following pages of subfactors commonly used to define factors.

3. Choose subfactors which reflect the job requirements of most value to your organization, and the work of your employees. List them below. Five to 10 subfactors are plenty. Note that you are not limited to these lists.

4. Discuss and reach consensus on a choice of subfactors.

SKILL ----------

MENTAL EFFORT ----------

PHYSICAL EFFORT ----------

RESPONSIBILITY ----------

WORKING CONDITIONS ----------

Commonly Used Subfactors

SKILL:

Ability to do detailed or routine work
Accuracy
Analytical ability
Aptitude required
Communicating in a second language
Communication skills - verbal
Communication skills - written
Creativity
Dexterity
Difficulty of operation/work
Education
Experience
Initiative required
Interpersonal skills
Judgement
Knowledge
Knowledge of machinery
Knowledge of materials and processes
Managerial techniques
Manual quickness
Manual or motor skills
Physical skill (co-ordination)
Problem solving
Resourcefulness
Social skills
Versatility

EFFORT:

Attention demand
Concentration
Manual effort
Mental fatigue
Monotony and discomfort
Muscular or nerve strain
Physical fatigue
Pressure of work
Stress from dealing with difficult people (for example, caring for sick people, handling complaints)
Visual application
Volume of work

RESPONSIBILITY:

Accountability
Accuracy
Cash
Confidentiality
Contact with public and/or customers/clients, etc.
Co-ordination
Cost of errors
Consequence of error
Details
Determining company policy
Effect on other operations
Equipment and machinery
Goodwill and public relations
Material
Methods
Monetary responsibility
Personnel
Physical property
Plant and services
Protecting confidentiality
Product
Quality
Records
Safekeeping
Safety and health of others
Spoilage of materials
Supervision of others
Volume of work

WORKING CONDITIONS:

Cleaning up after others
Constant interruptions
Danger
Dirtiness
Disagreeableness
Exposure to accident hazard
Exposure to health hazard
Monotony
Out-of-town travel
Physical environment/surroundings
Stress of multiple demands
Time pressure

EXERCISE ON ADAPTING OR WRITING FACTORS OR SUBFACTORS

This workbook provides sample definitions of the criteria or factors of skill, effort, responsibility and working conditions in two different ways. One way defines factors in one paragraph, as on the following page.

A second way selects subfactors as in Exercise 1, describes each subfactor in levels or degrees from the least to the most demanding, and assigns points to each level. This is illustrated in The Adaptable Twelve Subfactor Point System, page 85.

In this exercise, use the subfactors chosen in Exercise 1 to rewrite or expand the paragraph definitions provided on the following page. The purpose of rewriting is to make the definitions more applicable to your workplace.

EXERCISE 2: Adapting or Writing Factors

1. Refer to the paragraphs describing skill, effort, responsibility and working conditions on the following page.

   Adapt or rewrite these paragraphs to suit your workplace, using the subfactors you selected in Exercise 1. Use the form on page 77.

   OR

2. Refer to the definition of factors for the Adaptable Twelve Subfactor Point System, page 95.

   Adapt or rewrite a subfactor in this system to suit your workplace.

Factor Definitions

SKILL:

This factor measures the skills such as analytical, communication, computer, computational (using numbers), creative, interpersonal, financial, mechanical, mental, motor, organizational, problem-solving and other skills acquired by education, training or experience, required to perform the duties of the job.

MENTAL EFFORT:

This factor measures the amount of attentiveness or concentration (listening, mental and visual) and its duration required to do the job.

PHYSICAL EFFORT:

This factor measures the intensity of physical activity (light, medium and heavy) and its duration. It includes the physical demands of co-ordination (such as hand/eye co-ordination), dexterity, exertion and speed.

RESPONSIBILITY:

This factor measures the level of accountability for confidentiality, decisions, people contact, quality, quantity, resources (information, financial, human and technical), results, safekeeping, the safety and health of others, and teamwork. It includes supervision given and received.

WORKING CONDITIONS:

This factor measures the frequency and degree of exposure to disagreeable elements in the physical or psychological environment. Examples include conflict, deadlines, disagreeable elements (such as fumes, grease and human "dirt"), health hazards, heat, inclement weather, interruptions, noise, physical danger, time pressure and confined or awkward working position.

Revision of Factor Definitions

SKILL:

MENTAL EFFORT:

PHYSICAL EFFORT:

RESPONSIBILITY:

WORKING CONDITIONS:

EXERCISES ON WEIGHTING FACTORS

Weighting Factors

An organization may wish to make all four factors of equal importance in the job comparison system, (each would have 25% of the total value of the system), or it may choose to give some factors greater importance, or weight, than others.

Think about the process of renting an apartment. You would consider the condition of the apartment, the size, the location and the rent. All of these factors are important to you. When it comes to deciding which apartment to rent, however, some factors will have greater importance, or weight, than others.

You may decide location is more important to you than size. So, if you find an apartment that has a perfect location but is a bit small, you may select it, as you value location more than size. In effect, you have "weighted" location more heavily than size in making your decision to rent the apartment.

In the same way, when you set up your system for valuing jobs, you may decide that skill, effort, responsibility and working conditions are not of equal importance. You may decide that you value skill and effort more highly than responsibility and working conditions. Consequently, you could, for example "weight" skill at 30%, effort at 30%, responsibility at 20% and working conditions at 20%.

Any weightings may be used as long as they reflect what is valued by the company, or negotiated between company and union, are not gender biased, and are not chosen to contravene the purposes of the Act. Double check your calculations if you use weights.

Weighting of factors and gender bias in weighting are discussed in greater detail in How to Do Pay Equity Job Comparisons, starting on pages 29 and 39.

Exercise 3 illustrates a process to choose and to apply weights for the Paired Comparison Ranking System.

Exercise 4 illustrates a process to choose and to apply weights for the Basic Point Factor System.

The Adaptable Twelve Subfactor Point System has its own section on weighting. See page 140.

EXERCISE 3: Choosing Factor Weights and Applying them to the Paired Comparison Ranking System

Note: Weighting in this system cannot reflect small differences in factors.

1. Review the values and objectives of your workplace and the duties and responsibilities of the employees, as you did in Exercise 1.

2. With these in mind, each member of the committee assigns either a 1, 2 or 3 to each of the factors:

   - "1" indicates the factor (or factors) that is (are) the least important.
   - "2" is given to all factors that are twice as valuable to the organization as the factor(s) given a "1".
   - "3" is given to any factors that are three times as valuable as those given a "1". A "4" could be used but rarely, because it means a factor is four times as valuable as those of standard value.

   Factors are **NOT** being ranked. It is not a matter of assigning a factor to first, second, third and fourth place. Rather, you consider whether skill should be given a 1, 2, 3 or 4; and then whether effort should be given a 1, 2, 3 or 4. You can give the same number to more than one factor. The chart below provides some examples of possible outcomes of this process in different organizations:

Illustration of 3 organizations' values for factors:

FACTOR	ORGANIZATION		
	A	B	C
Skill	2	3	1
Effort	2	1	1
Responsibility	2	3	3
Working Conditions	1	2	1

Organization A values skill, effort and responsibility the same, and working conditions less. On the other hand, Organization B values effort the least, working conditions more than effort, and skill and responsibility the most.

3. Discuss these results and try to reach consensus about the importance of the factors.

4. If there is no agreement, record each member's list. Add up the number for each factor and divide by the number of committee members to provide an average (in this example, the total was divided by three).

Illustration of average factor values for a three-member committee in the same organization:

Member	Skill	Effort	Resp.	Working Conditions
C. Ankurs	2	2	3	1
D. Masters	3	2	4	1
J. Lee	2	1	3	2
Totals	7	5	10	4
Average	2.3	1.7	3.3	1.33

To make use of these weightings easier, round the averages to the nearest whole number to remove the decimal point.

To round, look at the number to the right of the decimal point. If it is less than five, remove it, for example 2.3 rounds to 2. If it is 5 or greater, increase the number to the left of the decimal point to the next highest number, for example 1.7 becomes 2.

To illustrate, the rounded weights for the averages above are:

Skill	2
Effort	2
Responsibility	3
Working conditions	1

5. Once the weights for each factor have been decided, multiply the results for each factor by the weight number on the Paired Comparison Ranking Forms. See step 6 of the Paired Comparison Ranking System, page 00.

EXERCISE 4: Choosing Factor Weights and Applying them to the Basic Point Factor System

1. Review the values and objectives of your workplace and the duties and responsibilities of the employees, as you did in Exercise 1.

2. With these in mind, each member of the committee lists the four factors in order of importance. The most important factor is a 4 and the least important is a 1.

3. Discuss these results and reach consensus.

4. If there is no consensus, record each member's list and add the results. The total for each factor shows its ranking within your organization.

Illustration of total factor values for a three-member committee:

Member	Skill	Effort	Respon-sibility	Working Condit	Total Points
J. Stein	4	2	3	1	
T. Xavier	3	2	4	1	
J. Wong	4	1.5	3	1.5	
Totals	11	5.5	10	3.5	30

5. Calculate the percentage to be given to each factor using the following procedure:

   - Add the total of each column to get the total number of points (11 + 5.5 + 10 + 3.5 = 30).
   - Divide each factor's total by the grand total (30) and multiply by 100.

Average percentage per factor:

Skill	11	divided by 30 x 100	= 36.6%
Effort	5.5	divided by 30 x 100	= 18.3%
Responsibility	10	divided by 30 x 100	= 33.3%
Working Conditions	3.5	divided by 30 x 100	= 11.6%
			100%

6. Use the chart below to find the appropriate scale for each factor based on the weights you have chosen. If you weight all four factors equally, each factor would be 25% and the scale of one to 10 points would be used.

Percentage Weight	Point Scale for Factors
5-10%	1 - 4 points
11-15%	1 - 6 points
16-20%	1 - 8 points
21-25%	1 - 10 points
26-30%	1 - 12 points
31-35%	1 - 14 points
36-40%	1 - 16 points
41-45%	1 - 18 points
46-50%	1 - 20 points

In the example above (step 5), the following point scale would be used for each of the four factors:

Skill	1 - 16 points
Effort	1 - 8 points
Responsibility	1 - 14 points
Working Conditions	1 - 6 points

This means that each job class evaluated on skill would be given a point value on a scale between one and 16; a job class evaluated on effort would be given a point value on a scale between one and eight points, and so on.

EXERCISE ON COMPARING JOBS

Exercise 5: <u>Comparing jobs</u>

1. Select at least two job classes to compare from the four job classes for which job information statements are provided starting on page 40: Secretary, Marketing Co-ordinator, Service Technician/ Installer, and Storeskeeper.

2. Select one of the following job comparison systems:

   - o Paired Comparison Ranking System page 55
   - o Basic Point Factor System page 64
   - o Adaptable Twelve Subfactor Point System page 93

3. Decide if you will weight the factors.

4. Value the job classes according to the selected job comparison system.

5. Use the forms provided with the systems to record your results.

6. Decide on comparable job classes.

AN ADAPTABLE

TWELVE SUBFACTOR

POINT SYSTEM

I N D E X

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INTRODUCTION

This portion of the workbook was designed to be used with other materials published by the Pay Equity Office. We recommend that you refer to them **before** using the point factor system contained in this section. In particular, please review the publication, How To Do Pay Equity Job Comparisons, and the rest of this workbook.

There are five parts to this portion of the workbook.

The first gives a general explanation about job comparison, point factor systems and pay equity committees.

The second part contains a complete point factor system, with twelve subfactors defined and a user's guide for each subfactor.

The third part contains sample forms for recording results when using the system.

The fourth part describes a simplified way to weight the subfactors contained in the system.

The last part provides a sample job questionnaire which can be used to gather job information relating to the subfactors for this system.

The job comparison system contained herein has been designed for educational purposes. It is intended to aid in the process of achieving pay equity. It will not restrict the Pay Equity Office or the Pay Equity Hearings Tribunal in their review of cases.

There are other methods of job comparison which may be appropriate for your establishment. If you choose to use this system, scrutinize it from the perspective of your own establishment. Modify it so that it will ensure that you reach pay equity. Without customizing it to suit your workplace and watching out for gender bias, both in the gathering of job information and in the application of the system by the committee, there is no guarantee that it will provide gender neutral job comparisons.

1. JOB EVALUATION

Job evaluation is just one method of doing job comparison. This section of the workbook outlines a modifiable "point factor" method of job evaluation.

Job evaluation is designed to determine **systematically** the value of jobs within an organization. By defining the factors of skill, effort, responsibility and working conditions according to the values of your organization, you can then evaluate each job class. The result is a fair ranking of your jobs according to their value. If the values are applied consistently to both female and male job classes, pay equity job comparisons can be achieved.

When using the job evaluation method which follows, it is important to remember that it is not concerned with the performance, seniority or other attributes of individual employees. It looks at the job content only.

To ensure fairness, the system should be used with accurate, up-to-date, gender neutral job information. Look at what the job is today, not what it may become. As jobs change over the course of weeks, months or years, the system can be used to re-evaluate them.

2. JOB EVALUATION COMMITTEES

A committee can better fulfill the need for balance, objectivity, credibility, gender neutrality and knowledge of jobs, than an individual rater.

It is best to include people on your committee who fit the following criteria:

*Do different jobs
*Come from various levels within the organization
*Have different kinds of backgrounds
*Have different lengths of service
*Represent a balance of men and women
*Represent various departments or branches
*Are not committed to current job or salary structure
*Represent both union and management; or employees and management.

Some words of caution:

Keep the focus on achieving pay equity:

o Don't discuss any other issues at the table.

Since the committee is striving to achieve consensus in its decisions:

o Don't bring people who are inflexible to change.

Arguing will happen -- it cannot be avoided. Make sure the participants know that comments made around the table should not be taken personally.

It is essential that the committee receive appropriate training. Spend a day or so training them on job evaluation in general; the job evaluation system you are using; pay equity and the requirements of the Pay Equity Act; and how to look for gender bias. Please refer to the booklet called How to do Pay Equity Job Comparisons and Pay Equity Commission Newsletter cover stories in issues numbered 5, 7, and 9.

Perhaps the most important goal is consistency -- both in the quality of job information gathered and the process itself.

This system attempts to describe the rules of application as carefully as possible. Every attempt has been made to anticipate all different types of circumstances. There will still undoubtedly be instances where there is ambiguity in the factor and subfactor definitions. The committee **must** agree on an

interpretation or change the words (or factors). It should then **record** its decision and ensure that it applies the change consistently.

Evaluating jobs starts once job information has been gathered and the committee has been trained. Here are some tips for committee members:

- **RATE JOBS IN RANDOM OR ALPHABETICAL ORDER, NOT BY JOB DEPARTMENT OR FAMILY**

  You are striving to avoid gender bias. If you list the jobs on the Rating Sheet (page 135) by grouping all female jobs and then all male jobs, you may get a biased result. Similarly, if you list jobs by department or job family, you could be reinforcing the existing bias since female and male jobs often are "ghettoized" in departments.

- **RATE ALL JOBS ACROSS EACH SUBFACTOR**

  You should rate the jobs subfactor by subfactor. (Example: Rate all job classes for "Job Knowledge". Once you have finished then move on to "Communication"). You will be less likely to bias the results by using this method.

- **DON'T LET TIME LAPSE BETWEEN RATING SESSIONS**

  You will achieve more consistency and productivity if you conduct consecutive rating sessions.

- **INDIVIDUAL COMMITTEE MEMBERS SHOULD FIRST RATE JOBS, - THEN THE GROUP SHOULD DISCUSS THE INDIVIDUAL RESULTS**

  Individual committee members are more likely to stick to their answer if they write it down first. There is less likelihood of "going along with the flow" and, therefore, less bias.

- **STRIVE FOR CONSENSUS**

  Consensus often means arguing. Taking a vote is not necessarily a good method of achieving consensus. Those who are voted against will leave the table feeling more disgruntled than if a discussion took place and they were persuaded.

- **KEEP NOTES OF THE CONSENSUS**

  Someone should be taking down notes of the reasons and the points assigned for each subfactor and for each job class. If questions arise regarding consistency of application or any challenge regarding correctness, the notes will be helpful.

- **RECORD AND REFER TO ANY MODIFICATIONS OF THE SYSTEM**

  Whenever terms appear unclear to the committee members, the terms should be discussed. Once new definitions are determined, they should be recorded so that consistent application will be possible.

- **RECORD AND REFER TO ANY ASSUMPTIONS ADOPTED**

  If a job covers elements from more than one level of a subfactor, you may decide to score the job at the highest of the levels because the elements in the higher level are required **even** if the job involves lower-level elements. The decision to do this should be recorded and referred to. A job may occasionally involve heavy physical effort. It may also occasionally involve light physical effort. However, the former is worth more in terms of compensation, and that should be recognized. Again, a record of the discussion should be taken.

BEFORE USING THE SYSTEM:

- Read all the subfactors and their definitions. Make sure they suit most of the jobs in your organization. Make sure the committee understands the definitions. Make sure you are not interpreting things into factors which would double or triple measure. This leads to bias. **THINK ABOUT MODIFYING THE SYSTEM TO SUIT YOUR ORGANIZATION.**

- Read the weighting section and determine which formula you are going to use. You may choose to leave the points off the levels and just record a level rating (1, 2, 3, 4 or 5). Then someone can transfer the points to the level ratings at the end. Sometimes, committee members can be influenced by looking at the points attached to a level.

- Read the Forms (pages 135 - 139) and make sufficient copies for all committee members.

- Assign someone the task of recording the committee's consensus decisions for each job for all subfactors. You should use a separate sheet for each job, (pages 136 - 138).

- Find a quiet space and request that no interruptions be allowed until the committee is finished.

- Do not bring any wage or salary information into the room. Knowledge of wages can and does influence the ratings!

- Remind the committee of their task - **to evaluate jobs** - nothing more.

3. THE ADAPTABLE TWELVE SUBFACTOR POINT SYSTEM OF JOB EVALUATION

The job evaluation method discussed in this section is a simple point factor system. The system starts with the four **factors** required by the legislation: skill, effort, responsibility and working conditions. These factors are then subdivided into twelve **subfactors.** These subfactors can then be defined in terms of their **degrees** or **levels.**

If you have never seen this method, turn to page 94. You will see, for instance, that the factor of skill has been defined in four parts: job knowledge, communication, dexterity and versatility. In turn, each subfactor has first been defined and then broken down into five levels.

The job evaluation committee first reviews the job information for each job class.

IT IS IMPORTANT TO NOTE THAT THE FIRST STAGE OF USING ANY SYSTEM IS THE GATHERING OF COMPLETE, ACCURATE, UP-TO-DATE, CONSISTENT, GENDER NEUTRAL JOB INFORMATION. A JOB INFORMATION QUESTIONNAIRE RELATING TO THE FACTORS IN THIS SYSTEM IS INCLUDED ON PAGES 148 - 208.

The committee assesses what level of each subfactor best describes that job. The levels of each subfactor have **points** assigned. Adding up the points that a job is scored gives you its total **value** to the organization. This provides a means for doing job comparison.

In order to determine the points to score, turn to pages 140 - 146, where there is an explanation of **weighting** methods.

IT IS IMPORTANT TO NOTE THAT ORGANIZATIONS MAY FIND IT NECESSARY TO MODIFY SUBFACTOR DEFINITIONS, THE NUMBER OF LEVELS, OR THE WEIGHTINGS.

You may find, for example, that a particular subfactor is not relevant to the jobs in your organization. You have the option of rewriting (which may include creating more subfactor levels) or eliminating it. If you increase the number of subfactor levels or eliminate it, however, remember to adapt the weightings of the remaining subfactors.

For further explanation of weighting refer to pages 78 - 82, which describe how subfactors are chosen, written and weighted. It will give you a better idea of how weighting can be changed to suit your organization. You will also find information on other types of job evaluation methodologies beginning on page 54.

S K I L L

Skill can be measured by using four subfactors:

SUBFACTOR 1: JOB KNOWLEDGE

SUBFACTOR 2: COMMUNICATION

SUBFACTOR 3: DEXTERITY

SUBFACTOR 4: VERSATILITY

REMEMBER TO HAVE YOUR COMMITTEE DEFINE THE QUANTITATIVE TERMS USED IN THESE SUBFACTORS. FOR EXAMPLE, YOU SHOULD DEFINE FOR YOUR ORGANIZATION SUCH TERMS AS "LITTLE OR NO", "SOME", "REGULAR", "CONSTANT", ETC.

RECORD THESE DEFINITIONS FOR REFERENCE AND TO ACHIEVE CONSISTENCY.

SUBFACTOR 1: JOB KNOWLEDGE

"THINK ABOUT THIS" ...

This subfactor of skill measures the **minimum** acquired or accumulated knowlege required to perform the **current** job tasks. **(Remember, you are not measuring individual performance. Presume the employees are doing the job satisfactorily.)** It is the combination of accumulation of education, experiences, observations, self-study and training as required by the current job that you are looking at. You should remember to consider any "at home" training (for example childcare, carpentry, sewing or woodworking) or life experiences (for example, organizing a function, developing interpersonal skills or personal budgetting) as well. Some programs, such as co-operative education and apprenticeships, combine education and experience on a formal basis.

You are measuring **how long** it would take for an average person to acquire the necessary education, experiences, training, etc., to do the current job.

Remember:

1. Do not consider **only** the actual education level of the employee currently doing the job. This may **not** reflect the true requirement.

2. Although documented or advertised requirements may be a clue regarding the necessary qualifications, they may also be more reflective of the current market conditions, for example, labour shortage or surplus.

You should try to determine benchmarks and then rate each job in relation to it. Benchmark (or key) jobs are jobs which have well-known or stable content and which current salary level is generally accepted. May be looked on as a "prototypical job" to form the basis of job or pay comparison.

When measuring job knowledge, any experience should be measured from the time of finishing the necessary education level (including any formal job training) and arriving at the job in question at a satisfactory level of competence. Consider the typical path to working in that job and calculate the months or years of accumulated knowledge required, assuming no unneccessary lags between jobs (and no promotions). Assume that an employee arrives at every step along the job path with the appropriate qualifications.

Here are some examples of the skills that can be covered under the term "job knowledge":

Reading; writing; mathematics; analyzing situations or analyzing data; bookkeeping; editing; proofreading; composing; gathering information or data; diagnosing problems; solving problems; fixing things; setting equipment switches, gauges or dials to appropriate specifications; assembling things; designing; teaching; negotiating; counselling; running tests; researching; making judgments; using technical or specialized tools; operating, adjusting or fixing machines/equipment; applying specialized techniques, generating new theories.

Now, think about your own organization - What are the job knowledge skills required in your jobs?

SUBFACTOR 1: JOB KNOWLEDGE:

This factor is used to measure the acquired knowledge necessary to perform the job. When measuring this factor you should consider any education through required schooling or self-study, any training, (including training in the current workplace), through required training school and/or "on the job" training, and any actual experience and/or observation from life's experiences. Consider which combination of these provide complete understanding of the tasks required to do the current job.

LEVEL ONE

Job tasks require little or no acquired knowledge. Job tasks may require knowledge in one functional area. Understanding of the job tasks may be acquired in the current workplace with some "on the job training" and observation; training is usually over short periods of time.

LEVEL TWO

Job tasks require some acquired knowledge. Understanding of the job tasks may be acquired through some job specific courses through schooling, self-study or through periods of training. Employee may perform more than one simple function requiring more lengthy "on the job training".

LEVEL THREE

Job tasks require a higher level of acquired knowledge obtained through higher levels of required schooling or self-study. Understanding of the job tasks is acquired progressively through a combination of required job specific courses and/or training periods. Employee may perform job tasks requiring the use of some analytical and/or interpretational skills.

LEVEL FOUR

Job tasks require some specialized acquired knowledge. Understanding of the job tasks is acquired progressively through completion of required schooling, and/or combination of courses and formalized training periods which may involve designation or certification. Employee may be required to use advanced job knowledge skills on a regular basis.

LEVEL FIVE

Job tasks require specialized acquired knowledge. Understanding of the job tasks may be acquired progressively through a combination of required highest level schooling (usually advanced degree or certification designated program) and/or lengthy periods of formalized training and observation. Job tasks may require the application of specialized job knowledge on a continuous basis and may assist in a variety of job functions in the organization.

SUBFACTOR 2: COMMUNICATION

"THINK ABOUT THIS" ...

This subfactor of skill measures the skill involved in communicating with others. Remember to consider both written and verbal communication skills. In some jobs it is a requirement to use courtesy and tact, discretion, explanations, a second language, persuasion, teaching or counselling skills (to name a few). In addition, some of your jobs may require employees to handle difficult communication situations. Some situations require that problems be resolved on the spot. Others require referral to a higher authority for resolution. Remember, not only are you considering the type of skills involved, you are looking at jobs that deal with difficult interactions and the frequency of the contacts.

Do **not** assume that employees in jobs with a lot of authority within your organization necessarily need as high a level of communication skills as those in jobs with less or no authority. The skill of dealing with sensitive or emotional situations can be a requirement at many different levels within your organization. Discuss this in some detail with other committee members.

Remember to consider communication skills in terms of:

(a) Who is the communication with;
(b) What communication skills are used;
(c) What is the frequency of using the skills;
(d) Does the communication involve problem or difficult situations;
(e) What kind of solution is expected or required when problems are presented.

You should try to determine benchmarks and then rate each job in relation to the other jobs in the organization.

When measuring **written** communication skills you may think in terms of:

Filling out pre-printed forms and straightforward message taking (at one end of the spectrum) to creative writing, report writing or policy writing (at the other end of the spectrum).

When measuring **verbal** communication skills you may think in terms of:

Answering routine enquiries and providing basic information (at one end of the spectrum) to making presentations, teaching or

engaging in complex counselling or negotiations (at the other end of the spectrum).

You may then think of each part of communication skills for a job class consistently when doing job comparison. For example, a committe might decide that **persuasion** can be viewed as:

Providing encouragement, selling, getting someone to agree to listen to an alternative solution, getting someone to agree to a settlement that is less than they hoped for, negotiating, giving a discretionary answer to achieve agreement, etc. The committee will write this definition down and refer to it for each job class.

Now, think of your own organization. What communication skills are required in the jobs?

SUBFACTOR 2: COMMUNICATION

This factor measures the skill of communicating with others as required by the job. When measuring this factor you should consider the extent to which the use of tact, courtesy, judgment, discretion, interpretation, explanation, persuasiveness, conciliation, negotiation and second language skills are required. In addition to considering whether the contacts are made inside or outside the organization, you should consider the frequency and necessity of the interaction and the level of difficulty or complexity of the problem or explanation required.

LEVEL ONE

Job tasks require little or no communication with others. Contacts are usually within the work unit or organization involving receiving basic instructions. Usually job does not involve difficult or problem situations.

LEVEL TWO

Job tasks require some communication with others throughout the workplace providing information of a routine, straightforward nature. On occasion, employee(s) may provide information to others outside the work unit or workplace. In addition to normal courtesy and tact, discretion is required when providing information to outside contacts. All difficult or emotional contacts are referred to a higher level. May require some basic second language skills on an occasional basis.

LEVEL THREE

Job tasks may require regular communication with others throughout the workplace and/or giving or receiving information outside the organization. Some explanation is required involving regular use of, (in addition to tact and courtesy), interpretation, judgment and persuasion, inside and/or outside the organization. On occasion, the job requires handling difficult explanations or problem situations. Emotional situations are referred to a higher level. Second language skills, providing straightforward information may be required.

LEVEL FOUR

Job tasks may require frequent communication with others throughout the workplace and outside the organization. More than tact and courtesy are required since contacts are regularly of a sensitive, emotional or volatile nature. Discretion, conciliation and/or negotiation and persuasion skills are frequently required when dealing with lengthy, explanative and complex problem situations. Second language skills may involve difficult explanations. Extremely volatile situations are referred to a higher level.

LEVEL FIVE

Job tasks may require constant communication with others throughout the workplace and outside the organization. Problem situations frequently involve highly emotional or volatile interactions requiring explanation, persuasiveness, conciliation and negotiation skills for most of the work period. The job may involve providing instructions of a more detailed nature, and/or may involve several departments or functions within the organization. Second language skills may involve lengthy, detailed and complex explanations.

SUBFACTOR 3: DEXTERITY

"THINK ABOUT THIS" ...

This subfactor of skill measures the two aspects of speed and precision required to do the job at a satisfactory level. Remember, you are not measuring individual performance when looking at speed. You assume that speed is the requirement and performance is satisfactory when the speed is achieved.

Dexterity includes both fine (delicate, intricate or precise) and coarse (heavy-handed or rough) motor movements. When measuring this factor, consider hand/eye, hand/foot or eye/foot coordination and finger use.

Note: Do not consider fatigue, monotony or body position in this subfactor. Those things will be measured in the subfactors for working conditions and effort.

For some jobs, dexterity will relate to the operation of equipment or machinery. Some examples of this are a carpenter, a sewing machine operator, a telephone switchboard operator or a machinist. In other jobs, dexterity is not related to the tools, equipment or machinery used in the job. Examples of this type of dexterity include a veterinarian, chiropractor, manual assembler or hand-sewer.

Here are some examples of **fine** motor movements:

Threading a needle and doing fine hand sewing;
Cutting hair;
Electronic repair or manual assembly;
Giving injections;
Taking blood;
Adjusting guages or a microscope.

Here are some examples of **coarse** motor movements:

Mopping or washing a floor;
Digging or shovelling dirt;
Bundling papers;
Operating a punch press;
Using a vaccuum;
Driving a car;
Gathering up garbage.

Here are a few examples of equipment and machinery which require dexterity of operation: **(Your committee should discuss how you**

can add to this list)

Car
Computer
Drill
Fabric cutter
Food Slicer
Iron
Carving Knife
Lathe
Milling machine
Pressing/steaming machine
Printing machine
Scissors
Sewing machine
Telex
Telephone console
Word processor

Now, think of your own organization - What are your requirements for dexterity?

SUBFACTOR 3: DEXTERITY

This factor measures the amount of manual dexterity (physical skill) required to do the job. When measuring this factor you should consider the muscle movement, co-ordination, precision and speed (frequency of muscle movement) required to do the job.

LEVEL ONE

Job tasks require little or no manual dexterity. Job tasks require a variety of easy muscle movements with no requirement for precision or speed. Employee(s) may be required to operate simple equipment or machinery, either automated or manual on an occasional basis.

LEVEL TWO

Job tasks require some manual dexterity. Job tasks require a variety of easy muscle movements with occasional requirement for speed, precision and co-ordination. Usually limited and/or infrequent requirement for employee(s) to operate simple equipment or machinery, either automated or manual.

LEVEL THREE

Job tasks may require manual dexterity on a regular basis. Job tasks require the use of fine motor skills with a requirement for speed, precision and co-ordination on a regular basis. Usually employee(s) required to repeat operation of more complicated equipment or machinery and/or perform manual assembly.

LEVEL FOUR

Job tasks may require frequent manual dexterity. Job tasks may require a high level of speed, precision and co-ordination. Usually employee(s) required to use fine motor skills and may involve the operation of one or two pieces of complicated equipment or machinery or performing manual assembly.

LEVEL FIVE

Job tasks may require constant manual dexterity. Job tasks require a high level of speed, precision and co-ordination of operation for most of the work time. Employee(s) required to use rapid, repeated use of small muscles involving extremely high level of fine motor skills. Usually involves the operation of one piece of equipment or machinery or performing manual assembly which may require continuously high level of dexterity.

SUBFACTOR 4: VERSATILITY

"THINK ABOUT THIS" ...

This subfactor of skill measures the amount of versatility required by the job. Some jobs require employees to cover for other jobs in the organization during illness, holidays or breaks. Other jobs require employees to carry out the full duties of a variety of jobs within the organization. Both types of situations demand versatility, but the scope of versatility is quite different for each. Consider whether the variety of job functions that are required include full duties and responsibilities at all times, or whether the functions are merely "maintained" until the regular employee returns to duty.

You should consider the difference between:

(a) Filling in for others by maintaining the routine aspects of the job (ie. "maintenance"). Any problems would be left for the regular employee;

(b) Filling in for others and being expected to carry out all aspects of the job, including any problem situations; and

(c) Handling a variety of job functions at all times.

In addition to the above, you should consider:

(a) Whether the employee is carrying out a variety of job functions but within a related functional area; or

(b) Whether the employee is carrying out a variety of job functions in very un-related functional areas.

You should determine a benchmark rating level and then rate each job in relation to the other jobs.

The extent to which the functions are **related** depends on how different the job tasks are. In some organizations, one job may involve everything from secretarial work , to bookkeeping, to office managing, to purchasing, to interviewing employees, to being the assistant to the owner -- and doing whatever else is necessary. Clearly the versatility required applies to unrelated functions.

In other organizations, the versatility might be more limited; for example, a job may involve working on a variety of related machinery or equipment such as a variety of welding machines.

The first example refers to versatility that crosses over functional lines. The second requires versatility but stays within one functional area.

Now, think of your own organization - How much versatility is required by the jobs?

SUBFACTOR 4: VERSATILITY

This factor measures the skill of turning from one job task or function to another within the organization. When measuring this factor you should consider the frequency, the extent to which the functions are different or related and the requirement for turning to and handling another job function in "whole" or in "part".

LEVEL ONE

Job tasks require little or no versatility. Employee usually performs one function within the organization at all times. Employee is usually not required to handle another job function in the organization at this level. (May perform additional partial job task in related functional area on an "emergency" basis only).

LEVEL TWO

Job tasks require some versatility. Employee is occasionally required to handle one other related job function within the organization. Employee may handle other job function on a more than partial basis.

LEVEL THREE

Job tasks require versatility on a regular basis. Employee is usually required to handle several job functions within the organization. Job functions are usually related. Employee may be required to provide more than partial and/or some whole job functions.

LEVEL FOUR

Job tasks may require versatility on a frequent basis. Employee is required to handle a variety of job functions. Employee is usually handling many related or several non-related job functions. Employee may usually required to provide more whole job functions within the organization.

LEVEL FIVE

Job tasks may require constant versatility. Employee is required to handle a variety of key job functions in the organization. Employee may be handling many non-related job functions on a constant basis. Different, whole job functions may be handled on a continuous basis.

E F F O R T

Effort can be measured by using three subfactors:

SUBFACTOR 5: Strain from lack of control over work

SUBFACTOR 6: Physical demand

SUBFACTOR 7: Mental demand

REMEMBER TO HAVE YOUR COMMITTEE DEFINE THE QUANTITATIVE TERMS USED IN THESE SUBFACTORS. FOR EXAMPLE, YOU SHOULD DEFINE FOR YOUR ORGANIZATION SUCH TERMS AS "REGULAR", "SOME", "FREQUENT", "OCCASIONAL", "RECURRING", "CONTINUOUS", ETC.

RECORD THESE DEFINITIONS FOR REFERENCE AND TO ACHIEVE CONSISTENCY.

SUBFACTOR 5: STRAIN FROM LACK OF CONTROL OVER WORK

"THINK ABOUT THIS" ...

This subfactor of effort measures the degree to which the nature, flow or pace of the job is controlled. Not being able to have control over the job causes a drain on energy.

You should consider the frequency -- and predictability -- of deadlines. For instance, some jobs have peak periods when deadlines are tight. However, at other times, the deadlines are more relaxed. Other jobs may have tight deadlines on a constant basis. You should consider whether the jobs have daily, weekly, monthly or yearly deadlines or peak periods and their predictability.

You should consider how much control there is over the flow or pace of work. You should consider whether the control is by human beings or machines. Some jobs have performance quotas. There can be electronic devices designed to control pace. These devices may be designed to control pace but they can cause mental strain. Some jobs allow an employee control over their own work flow. Other jobs mean reacting regularly to last-minute rushes imposed by others (supervisors, customers etc). Some jobs must deal regularly with competing deadlines.

It is important for the committee to take the time to discuss whether the control is real or perceived. It is also important for the committee to examine the effects of regular deadlines vs. frequent "last minute rushes". Is it less stressful if you **know** when the deadlines are - so you can plan for the peak periods? Is there a regular need to work extended hours to complete job tasks?

You should try to determine a benchmark rating level and then rate each job in relation to the other jobs in the organization.

Do not consider decision-making or what role consequence of error plays. These are measured in the subfactors of responsibility.

You are, however, looking at the strain resulting from the inability to control the work demands or flow.

SUBFACTOR 5: STRAIN FROM LACK OF CONTROL OVER WORK

This factor measures the effort, strain or demand on energy from dealing with lack of control over work associated with the job. When measuring this factor you should consider the number of time constraints (work deadlines), frequency of interruption to work and degree to which flow and/or pace is controlled or imposed by others while doing the job.

LEVEL ONE

Job tasks require little or no demand on energy from lack of control over work. Employee usually has no interruptions to work imposed nor is work pace unpredictable or controlled by others. Employee generally works to a predictable schedule, with little change in flow, pace or deadline.

LEVEL TWO

Job tasks require some demand on energy from lack of control over work. Employee may have some interruptions to work flow/pace imposed or work demands may be changed by others. Generally, employee works to singular deadlines with regularity and predictability. Occasionally, may have a change in deadline. Employee may have predictable "peak periods" of work or extra work.

LEVEL THREE

Job tasks require regular demand on energy from lack of control over work demands. Employee may have regular interruptions or changes to work flow/pace imposed or controlled by others. Employee may have more than occasional unexpected change in deadline, and/or may be required to extend normal hours of work to meet deadline and demands.

LEVEL FOUR

Job tasks may require frequent demand on energy from lack of control over work. Employee may have frequent interruptions to work flow/pace imposed or controlled by others. Schedules and/or deadlines may be frequently changed. Employee may have many deadlines to meet with a great degree of unpredictability.

LEVEL FIVE

Job tasks may require constant demand on energy from lack of control over work. Employee has constant interruptions to work flow/pace, scheduling changes or constantly controlled by others. Employee may have to meet multiple deadlines and usually requires extending normal hours of work to meet demands. Employee may have little or no control over work at this level.

SUBFACTOR 6: PHYSICAL DEMAND

"THINK ABOUT THIS" ...

This subfactor of effort measures the physical demand required to complete tasks.

Remember: Ignore the individual employee's state of physical fitness. Assume employees are all in good health and have the necessary strength to perform the job satisfactorily.

You should consider the amount of time spent in physical effort over the course of a day, week or month. You should also consider whether the physical demand involves animate, people or inanimate, boxes, objects. Things or objects which squirm, change shape or are moving, for example, may require more physical demand to carry, lift, etc., than things which are incapable of any movement or change in form.

Many jobs may now have labour-saving equipment or machinery which has changed the nature of the physical effort required. For example, some jobs known for the manual heavy lifting involved now use a forklift truck or wheeled dolly to assist with the load. You should be considering the amount of weight actually lifted by the human body. Lighter objects, if lifted, carried, grasped or moved repeatedly, produce as much or more muscle fatigue as heavier objects moved less frequently.

While heavy physical labour is usually associated with this subfactor, physical demand should include travel or rotating shifts. Both have been shown to cause strain from disruption to the body and to lifestyles. Organizations have always tended to compensate for the less attractive afternoon or night shifts through a shift premium. Consider whether rotating shifts are involved. Remember that shift premiums do not always provide compensation for rotating shifts.

The following chart represents an example of how you might consider physical demand over the course of "part" of a day, "most" of the day or "all the time" (occasional, recurring and continuous), in terms of light, moderate or heavy demand. The references to levels in the boxes represent the levels in the subfactor.

Physical Demand - Cont'd

You should determine a bench mark rating level and then rate each job in relation to the other jobs in the organization.

	Occasional	Recurring	Continuous
Light	Level 1	Level 2	Level 3
Moderate	Level 2	Level 3	Level 4
Heavy	Level 3	level 4	Level 5

Remember there may be several ways to determine where a job is placed on this grid. For example, a job requiring light physical effort on a regular basis would, in this system, places it at Level 3. A job requiring heavy physical effort on an occasional basis would also place it at Level 3.

Now, think of your own organization - What physical demands are required in your jobs?

SUBFACTOR 6: PHYSICAL DEMAND

This factor measures the physical effort or demand on physical energy required to do the job. When measuring this factor you should consider the type and duration of physical effort as well as the frequency, the strain (which causes fatigue) from rapid and repetitive fine muscle movements or strain from the use of larger muscle groups and/or awkward or uncomfortable bodily positions and flexibility (choice) of movement and/or strain (which causes fatigue) from working alternating shifts and/or travel.

LEVEL ONE

Job tasks require little or no physical demand. Employee may use occasional light physical effort for short periods of time. Employee has high degree of flexibility of movement with no requirement for speed or repetition at this level.

LEVEL TWO

Job tasks require some physical demand. Employee may use light physical effort or occasional moderate physical effort, for short periods of time. There is an occasional requirement for repetition and/or speed. Employee usually has comfortable bodily positions with flexibility of movement. There is usually no requirement for shift work or travel.

LEVEL THREE

Job tasks require regular physical demand. Employee may use light physical effort regularly or recurring periods of moderate effort or occasional periods of heavy effort over longer periods of time. There is a regular requirement for speed and repetitive use of muscles causing fatigue and strain. Employee is in uncomfortable or awkward bodily positions for short periods of time with some flexibility of movement. There may be an occasional requirement for shift work or travel.

LEVEL FOUR

Job tasks may require frequent physical demand. Employee may use continuous moderate effort or recurring heavy effort at this level. There may be a frequent requirement for repetitition and speed causing strain and fatigue to muscles. Employee may be in awkward bodily positions over extended periods of time with limited flexibility of movement. Employee may work alternating shifts on a regular basis and/or travel extensively.

LEVEL FIVE

Job tasks may require constant physical demand. Employee uses continuous heavy physical effort. There is extreme fatigue and muscle strain through repeated use of muscles and/or awkward,

uncomfortable bodily positions for most of the work time. Employee may have little or no flexibility of movement at this level. Employee may work alternating shifts on a constant basis and/or travel constantly.

SUBFACTOR 7: MENTAL DEMAND

"THINK ABOUT THIS" ...

This subfactor of effort measures the amount of mental energy required to do the job tasks.

You should consider whether there is concentration or creativity required and how frequently they are needed.

Remember: You are not measuring the frequency of turning from one job to another. That can be measured with the subfactor Versatility. Here you are measuring the amount of energy used to concentrate or to be creative on the job. You should also consider how the senses are used on the job. For example, does the job require the concentrated use of hearing, taste, sight, or smell? How often are they used and to what extent? For example, does the job involve checking for alignment, for spelling, for typographical errors, microscopic analysis? Does it involve intense hearing to enable transcribing or translating, etc.?

You should also consider the amount of creativity required. There is demand placed on mental energy in the creation of new ideas, plans, tools, etc. To what extent is creativity a requirement of the job? How much is it used on a daily, weekly or monthly basis?

As well as answering the above questions, you should discuss as a committee your thoughts concerning whether or not it requires more mental energy to concentrate on one thing or a variety of things over the course of a day. Whatever decisions you make, be sure you apply the decisions consistently to all jobs you rate.

You should determine a bench mark rating level and then rate each job appropriately, relative to the other jobs.

Now, think of your own organization - What mental demands are required while doing your jobs?

FACTOR 7: MENTAL DEMAND

This factor measures the mental effort or demand on mental energy required to do the job. When measuring this factor you should consider the frequency and level or degree of concentration and sensory demands (seeing, hearing, smelling, touching, tasting) and creativity required to do the job.

LEVEL ONE

Job tasks require little or no demand on mental energy. Employee required to use concentration occasionally; usually to a normal degree. Job tasks may require occasional sensory demands but usually for short periods of time.

LEVEL TWO

Job tasks require some demand on mental energy. Employee required to use concentration for some of the work time; usually to a normal degree. Employee may use some sensory demands for close attention to work; usually not to an exacting degree. May require some creativity on an occasional basis.

LEVEL THREE

Job tasks require regular demand on mental energy. Employee required to use concentration regularly throughout the work time. Employee may use some sensory demand for part of the work period and may involve more than one of the senses to a more exacting degree. Employee may use creativity on a regular basis.

LEVEL FOUR

Job tasks may require frequent demand on mental energy. Employee usually required to use concentration for longer periods throughout the work time. Employee may use multiple sensory demands and/or use close, exacting attention to work on a frequent basis. Employee may use creativity on a frequent basis.

LEVEL FIVE

Job tasks may require constant demand on mental energy. Employee required to use concentration to a very high degree for most of the work time. Employee may frequently uses close, exacting attention to detail using one or more of the senses continuously. Employee may use creativity on a continuous basis.

RESPONSIBILITY

Responsibility can be measured by using three subfactors:

SUBFACTOR 8: **Responsibility for resources**

SUBFACTOR 9: **Responsibility for decision-making**

SUBFACTOR 10: **Responsibility for others**

REMEMBER TO HAVE YOUR COMMITTEE DEFINE THE QUANTITATIVE TERMS USED IN THESE SUBFACTORS. FOR EXAMPLE, YOU SHOULD DEFINE FOR YOUR ORGANIZATION SUCH TERMS AS "LITTLE OR NO", "SOME", "DIRECT", "INDIRECT", ETC.

RECORD THESE DEFINITIONS FOR REFERENCE AND TO ACHIEVE CONSISTENCY.

SUBFACTOR 8: RESPONSIBILITY FOR RESOURCES

"THINK ABOUT THIS" ...

This subfactor of responsibility measures the value of jobs based on the responsibility required. It measures the extent of responsibility for services, information, people, money or finances, materials, equipment or machinery, as well as the consequence of errors.

Remember to assume responsible and competent behaviour. Do not consider what could happen if sabotage or incompetence were issues.

The cost of the resource as an asset to the organization is considered here, as well as its importance to the daily routine. For instance, will the work flow or service be interrupted until the resource can be fixed or replaced. When measuring the responsibility for material and financial resources, consider discretionary spending limits. Also consider the responsibility for earning as well as spending resources, since in many cases they are flip sides of the same coin. When measuring responsibility for information consider to what extent the organization provides or deals in information. For example, are you in the business of providing information as a service, (travel agency, consulting firm, etc.).

When measuring the possibility of damage you should consider the vulnerability of the materials, equipment or machinery. If, for example, there are safeguards or checks against the possibility of damage or loss, the responsibility level is lower than if no safeguards are there.

Responsibility for people in this factor looks at people as a resource. Consequently, this refers to responsibility for ensuring proper staffing requirements, forecasting, succession planning, etc.

Note: Do not consider supervisory responsibility, disciplinary duties, etc. These are measured under the subfactor responsibility for others.

When considering consequence of error, keep in mind that this sub-factor presumes that decisions will be made with every intent of being correct, sometimes in the fact of limited or inaccurate information or changed circumstances.

You should determine a benchmark rating level and then rate each job in relation to the other jobs in the organization.

SUBFACTOR 8: RESPONSIBILITY FOR RESOURCES

This factor measures the responsibility or accountability for resources required by the job. When measuring this factor you should consider the direct or indirect responsibility for finances, equipment, machinery, materials or people as well as the likelihood and probable effect of any losses (time or money) to the organization.

LEVEL ONE

Job tasks require little or no responsibility for resources. There may be some indirect responsibility for own resources. There is usually little likelihood of losses to the organization at this level.

LEVEL TWO

Job tasks require some direct responsibility for resources. Employee usually has some direct responsibility for own resources. There may be some low level decisions regarding resources made at this level. There is only minimal loss of time and money to the organization.

LEVEL THREE

Job tasks require direct restricted responsibility for resources. Employee may be responsible for the resources of a group of employees or work unit. The decisions regarding resources usually have limits or restrictions attached. Usually, any losses to the organization are somewhat significant.

LEVEL FOUR

Job tasks require direct responsibility for resources. Employee may be responsible for the resources of several work units, branch, or division of the organization. The decisions regarding resources is usually at a high level with less restrictions. There may be more significant delays in phases of work resulting in potential loss of time and finances or public embarrassment and/or reduced morale.

LEVEL FIVE

Job tasks may require direct responsibility for the resources of the organization. Decisions may be made regarding organizational spending in all functional areas. Inadequate resource planning or allocation could result in extremely significant losses to the organization and/or shut-down.

SUBFACTOR 9: DECISION-MAKING

"THINK ABOUT THIS" ...

This subfactor of responsibility measures the level of decision-making in relation to the mission or overall success of the organization.

This factor can be seen from two perspectives. Firstly, through the freedom to act and the initiative required in the job or through the impact of decisions made on the organization.

Remember to assume competent and responsible behaviour. Do not consider sabotoge or negligence.

You should consider only the decision-making which is within the control of that job. Consider the checks and balances which may bring errors to light. You should determine what the **real** possibility is of a wrong decision going beyond the supervisor, work unit, department or organization (into the public domain) before being detected and corrected.

What is the nature of the decision made? For instance, is judgment required or some analysis of a situation? Are decisions routine or complex? What would be the real loss to the organization as related to material cost, public relations, competitive advantage, or time?

You should be discussing the answers to these questions with your committee to determine the **real** freedom to act involved in the decision-making process.

You should determine a benchmark rating level and then rate each job in relation to the other jobs in the organization.

Now, think of your own organization - What is the responsibility for decision-making required by your jobs?

SUBFACTOR 9: RESPONSIBILITY FOR DECISION-MAKING

This factor measures the responsibility or accountability for decision-making (for other than resources) as it affects the productivity and overall success of the organization as required by the job. When measuring this factor you should consider the freedom to make decisions, the level and/or nature of the decision as it affects other work phases (consequence of error) as required by the job.

LEVEL ONE

Job tasks require little or no responsibility for decisions. There is little or no freedom to make decisions at this level.

LEVEL TWO

Job tasks require responsibility for decisions. There is usually restricted freedom to make decisions. Decisions may have a limited negative impact on other job functions. There is little or no consequence of error in relation to other work phases or functions within the organization.

LEVEL THREE

Job tasks require responsibility for decisions. There is usually limited freedom to make decisions. Other job functions may depend on decision for services, materials, information, etc. Errors may cause substantial delays with other phases of work or reduce morale.

LEVEL FOUR

Job tasks require responsibility for decisions. There is usually some freedom to make decisions. Employee may make decisions with freedom to make recommendations. Decisions could affect overall planning for the organization. Errors may have negative effect on success of organization and cause poor morale within the organization.

LEVEL FIVE

Job tasks require responsibility for decisions. Decisions may directly affect major programs, policies, plans and progress for entire organization. Errors could have an extremely negative impact on the success of organization and/or cause shut-down. Usually, employee morale is affected to a negative extreme.

SUBFACTOR 10: RESPONSIBILITY FOR OTHERS

"THINK ABOUT THIS" ...

This subfactor of responsibility measures the accountability for the work, safety, health and well-being of others as required by the job. It also measures how much supervision is required to do the job.

Responsibility for the work or performance of others could include:

Assigning or scheduling work to others;
Checking the work of others;
Interviewing candidates for hire;
Recommending candidates for hire;
Setting salary rates;
Recommending salary rates;
Determining job requirements;
Developing training programs;
Conducting training;
Disciplining others;
Monitoring and conducting interviews about performance;

to name a few.

Responsibility for the well-being of others could include:

Ensuring proper training opportunities;
Counselling employees;
Promoting or designing wellness programs or employee assistance programs;

to name a few.

Responsibility for safety and health of others may involve:

Ensuring proper health and safety training is available;
Monitoring the use of proper safety equipment;
Communicating safety policies and legislation;
Conducting safety training;
Ensuring the safety and health of the public, customers, clients, etc.

to name a few.

You should consider whether the job must be closely supervised or whether minimal supervision is required.

You should determine a benchmark rating level and then rate each job in relation to the other jobs in the organization.

Now, think of your own organization - How much responsibility for the performance, safety and well-being of others is required by your jobs?

SUBFACTOR 10: RESPONSIBILITY FOR OTHERS

This factor measures the responsibility or accountability for the performance, safety and well-being of others as required by the job. When measuring this factor you should consider the level of training delivered to others and the level or type of supervisory requirements of the job.

LEVEL ONE

Job tasks require little or no responsibility for the performance, safety, health and well-being of others. Employee usually performs one job function under close supervision. Usually employee requires training and supervision by others in connection with safety rules and regulations.

LEVEL TWO

Job tasks require some responsibility for the performance, safety, health and well-being of others. Employee occasionally may show others how to perform aspects of own job function (not formal training). Employee may show others safety and health requirements of job function as learned.

LEVEL THREE

Job tasks require direct responsibility for the performance, safety, health and well-being of others. Employee may assign or schedule work to a limited degree and arrange and/or provide safety and health regulation training. Employee may monitor and report any disciplinary problems to immediate supervisor.

LEVEL FOUR

Job tasks require direct responsibility for the performance, safety, health and well-being of others. Employee may supervise a work unit(s), branch or department, carrying out performance reviews and/or disciplinary meetings and follow up action. Employee may formally train others on regulations and legislation governing health and safety requirements.

LEVEL FIVE

Job tasks may require overall responsibility for performance, safety, health and well-being of others as it affects the productivity and success of the organization. Employee may provide policy/outline of training programs to be carried out. May be accountable for overall compliance with legislation and regulations within the organization.

WORKING CONDITIONS

Working Conditions can be measured by using two subfactors.

SUBFACTOR 11: Physical environment

SUBFACTOR 12: Hazards

REMEMBER TO HAVE YOUR COMMITTEE DEFINE THE QUANTITATIVE TERMS USED IN THESE SUBFACTORS. FOR EXAMPLE, YOU SHOULD DEFINE FOR YOUR ORGANIZATION SUCH TERMS AS "SLIGHTLY", "MODERATELY", "EXTREMELY", "OCCASIONALLY", "RECURRING", "CONTINUOUS", ETC.

RECORD THESE DEFINITIONS FOR REFERENCE AND TO ACHIEVE CONSISTENCY.

SUBFACTOR 11: PHYSICAL ENVIRONMENT

"THINK ABOUT THIS" ...

This subfactor of working conditions measures disagreeable elements found in the workplace.

You will see from the definition of this subfactor and with reference to the disagreeableness of elements in the workplace, we use the terms:

slightly (disagreeable)
moderately (disagreeable)
extremely (disagreeable)

Your committee should define for your workplace which elements are "slightly" disagreeable, "moderately" disagreeable or "extremely" disagreeable.

You should then determine a benchmark rating level and rate each job in relation to the other jobs in the organization.

Here are some disagreeable elements which might be found in your workplace:

blood
cold/hot environment due to machinery, equipment or temperature control
human body waste/foul odours
hospital waste
humidity
isolation
lack of windows
odour
small workspace
steam
chemical substances
cold/hot weather
dirt
dust
grease/oil
human noise
industrial garbage
lack of privacy
equipment/machine fumes
equipment/machine noise
smoke

Your committee should review this list and add to it any elements that apply to your organization that are not shown.

The following chart represents an example of how you might consider exposure to disagreeable elements over "part" of a day, "most" of a day or "all the time". We have used the terms "occasionally", "recurring" and "continuous".

Again, you should be defining these terms to suit your own workplace and then using a benchmark rating level as a starting point.

	OCCASIONALLY	RECURRING	CONTINUOUS
SLIGHTLY	Level 1	Level 2	Level 3
MODERATELY	Level 2	Level 3	Level 4
EXTREMELY	Level 3	Level 4	Level 5

Remember, your committee discussions will determine what qualifies a job to be placed within a certain level. From our chart, for example, we are suggesting that a job which has "occasional" exposure to "extremely" disagreeable elements would be placed at Level 3 in this system. This chart is to be used as a reference guide only. Remember to be consistent with your ratings.

Now, think of your own organization - What are the types of disagreeable elements found and the amount of exposure which is experienced on the job?

SUBFACTOR 11: PHYSICAL ENVIRONMENT

This factor measures working conditions in terms of the physical environment while doing the work. When measuring this factor you should consider the probability or likelihood of exposure to disagreeable elements, nature of the disagreeable element, (slightly, moderately or extremely disagreeable) and length of exposure while on the job.

LEVEL ONE

Job tasks are carried out with little or no exposure to disagreeable elements. Employee may experience occasional exposure to slightly disagreeable elements.

LEVEL TWO

Job tasks are carried out with some exposure to disagreeable elements. Employee may experience recurring exposure to slightly disagreeable elements

or

occasional exposure to moderately disagreeable elements.

LEVEL THREE

Job tasks are carried out with regular exposure to disagreeable elements. Employee may experience continuous exposure to slightly disagreeable elements

or

recurring exposure to moderately disagreeable elements

or

occasional exposure to extremely disagreeable elements.

LEVEL FOUR

Job tasks are carried out with frequent exposure to disagreeable elements. Employee may experience continuous exposure to moderately disagreeable elements

or

recurring exposure to extremely disagreeable elements.

LEVEL FIVE

Job tasks are carried out with constant exposure to disagreeable elements. Employee may experience continuous exposure to extremely disagreeable elements.

SUBFACTOR 12: HAZARDS

"THINK ABOUT THIS" ...

This subfactor of working conditions measures the hazards found in the organization and the frequency of exposure.

You will see from the definition of this subfactor and with reference to the degree of hazard found in the workplace, we use the terms:

slightly	(hazardous)
moderately	(hazardous)
extremely	(hazardous)

Your committee should define for your workplace which elements are "slightly" hazardous, "moderately" hazardous or "extremely" hazardous.

You should then determine a benchmark rating level and rate each job in relation to the other jobs in the organization.

Here are some hazards which might be found in your workplace:

equipment/machinery with open flame or electricity
equipment/machinery with moving parts
exposure to radiation
falling
hot solutions
inadequate ventilation
infectious diseases
inhalation of fibres or other substances
lifting
noxious fumes
sharpened instruments or tools
toxic or corrosive substances
violence (or the threat of violence)

Your committee should review this list carefully and add to it any hazards which are found in your organization that are not shown.

Keep in mind that hazards in the workplace can cause everything from minor injuries (such as low grade burns, cuts and bruises) to

temporary injuries (such as broken limbs, dizziness and chronic headaches) to longer term disabilities, (chronic respiratory problems) to permanent disabilities (loss of limbs, sight or hearing). In some instances, workplace hazards can cause loss of life.

The following chart shows an example of how you might consider exposure to hazards over "part" of a day, "most" of a day or "all the time". We have used the terms "occasionally", "recurring" and "continuous". **Again, you should be defining these terms to suit your own workplace and then using a benchmark rating level as a starting point.**

	OCCASIONALLY	RECURRING	CONTINUOUS
SLIGHTLY	Level 1	Level 2	Level 3
MODERATELY	Level 2	Level 3	Level 4
EXTREMELY	Level 3	Level 4	Level 5

Remember, your committee discussions will have determined what qualifies a job to be placed within a certain level. From our chart, for example, we are suggesting that a job which has "continuous" exposure to "moderately" hazardous elements would be placed at Level 4 in this system. This chart is to be used as a reference guide only. Remember to be consistent with your ratings.

Now, think of your own organization - What are the types of hazards that are found in your workplace and what would be the result of exposure?

SUBFACTOR 12: HAZARDS

This factor measures working conditions in terms of exposure to hazards while doing the work. When measuring this factor you should consider the probability or likelihood of exposure, nature of the hazard (slightly, moderately or extremely hazardous), length of exposure to hazards and probable severity of injuries and/or health problems sustained due to such exposure while doing the work.

LEVEL ONE

Job tasks are carried out with little or no exposure to hazards. Employee may have occasional exposure to slightly hazardous elements. There is little likelihood of injury or health problems at this level.

LEVEL TWO

Job tasks are carried out with some exposure to hazards. Employee may have recurring exposure to slightly hazardous elements

or

occasional exposure to moderately hazardous elements. There is some likelihood of low level injuries or health problems at this level.

LEVEL THREE

Job tasks are carried out with frequent exposure to hazards. Employee may experience continuous exposure to slightly hazardous elements

or

recurring exposure to moderately hazardous elements

or

occasional exposure to extremely hazardous elements. There is a greater likelihood for more severe injuries and health problems.

LEVEL FOUR

Job tasks are carried out with continuous exposure to hazards. Employee may experience continuous exposure to moderately hazardous elements

or

recurring exposure to extremely hazardous elements. Usually, employee has more severe injuries and permanent health problems.

LEVEL FIVE

Job tasks are carried out with constant exposure to hazards. Employee may experience continuous exposure to extremely hazardous elements. Employee may have extremely severe injuries or loss of life.

FORMS

Rating Sheet

	Skill				Effort			Responsibility			Working Conditions		
Job Class	job know	com	dext	vers	cont work	phys dem	men dem	res	decs	oths	envir	hazs	Total Points

RECORD OF REASONS FOR CONSENSUS DECISION

JOB CLASS:_____

SUBFACTOR LEVEL

JOB KNOWLEDGE:

COMMUNICATION:

DEXTERITY:

VERSATILITY:

SUBFACTOR LEVEL

STRAIN FROM LACK
OF CONTROL OVER WORK:

PHYSICAL DEMAND:

MENTAL DEMAND:

RESPONSIBILITY FOR
RESOURCES:

SUBFACTOR LEVEL

RESPONSIBILITY FOR
DECISION-MAKING:

RESPONSIBILITY FOR
OTHERS:

PHYSICAL ENVIRONMENT:

HAZARDS:

JOB CLASS HIERARCHY CHART

(LIST JOB CLASSES IN DESCENDING ORDER BY POINTS TOTAL)

JOB CLASS	MALE OR FEMALE DOMINANT	POINTS TOTAL

5. WEIGHTING FACTORS AND SUBFACTORS: METHODS AND EXAMPLES

For some organizations it may be obvious, for example, that the "skill" required to do the job is of more value than the "effort" involved. In other organizations the opposite may be true. The Pay Equity Act dictates that jobs **must** be measured using skill, effort, responsibility and working conditions. It does **not**, however, indicate how these factors should be weighted. How much importance you place on each of the factors in your job evaluation system is as important as determining what your organization's values are in the first place. The importance placed on the individual factors is referred to as "weighting". The process of weighting the factors is another area where you must avoid letting gender bias creep in. More is said about this shortly. Keep in mind that weighting **can** dramatically change the final evaluation outcome.

By ignoring the weighting issue altogether, an organization is choosing (by default) to give all factors equal weight. This method would also give each of the subfactors equal weight. Thus, level 5 under job knowledge, for instance, would be worth the same as Level 5 under physical effort. Each level would be worth five points. Similarly, level 2 under responsibility for resources would be worth the same as level 2 under physical environment, a value of two points.

Typically, different organizations do **not** value all factors in the same manner. Nor do they value them equally. This is to be expected and is certainly in keeping with the self-managed process which the Act promotes. The market place also tends to reward certain factors more than others. Keep in mind, however, that the market also tends to undervalue (or underweight) certain factors which are associated with female jobs. Weighting is another area where gender bias may enter. It can undo many of the preventive or gender neutral safeguards that have been used in other stages of the job evaluation process. Inappropriate weightings which favour male jobs or female jobs must be avoided.

The adaptable twelve subfactor point system incorporates four factors:

SKILL
EFFORT
RESPONSIBILITY
WORKING CONDITIONS

as required by the Pay Equity Act.
These factors have been defined in terms of:

SKILL:
Four Subfactors:
- **Job Knowledge**
- **Communication**
- **Dexterity**
- **Versatility**

EFFORT:
Three Subfactors:
- **Dealing With Lack Of Control Over Work Flow**
- **Physical Demand**
- **Mental Demand**

RESPONSIBILITY:
Three Subfactors:
- **Responsibility for Resources**
- **Responsibility for Decision-making**
- **Responsibility for others**

WORKING CONDITIONS:
Two Subfactors:
- **Physical Environment**
- **Hazards**

If your organization decides to weight all factors evenly (25% each) you should then divide the weights evenly within each subfactor. The following chart shows points associated with each subfactor level. Example 1 provides the points when all subfactors are equally weighted -- 2 and 3 show different weighting schemes.

	Level 1	2	3	4	5
EXAMPLE 1: EQUAL WEIGHTING					
Skill (25% divided between 4 subfactors)					
Job Knowledge:(6.25%)	6.25	20.25	34.25	48.25	62.5
Communications:(6.25%)	6.25	20.25	34.25	48.25	62.5
Dexterity:(6.25%)	6.25	20.25	34.25	48.25	62.5
Versatility:(6.25%)	6.25	20.25	34.25	48.25	62.5
Effort (25% divided between 3 subfactors)					
Strain From Lack of Control Over Work:(8.3%)	8.0	27.0	46.0	65.0	84.0
Physical Demand:(8.3%)	8.0	27.0	46.0	65.0	84.0
Mental Demand:(8.3%)	8.0	27.0	46.0	65.0	84.0
Responsibility (25% divided between 3 subfactors)					
Responsibility For Resources:(8.3%)	8.0	27.0	46.0	65.0	84.0
Responsibility for Decision-making:(8.3%)	8.0	27.0	46.0	65.0	84.0
Responsibility for Others:(8.3%)	8.0	27.0	46.0	65.0	84.0
Working Conditions (25% divided between 2 subfactors)					
Phys. Environment:(12.5%	12.5	40	68	96.5	125
Hazards:(12.5%)	12.5	40	68	96.5	125

EXAMPLE 2:

If your organization decides to weight the factors:

Skill (30%)
Effort (20%)
Responsibility (30%)
Working Conditions (20%)

	Level				
	1	**2**	**3**	**4**	**5**
Skill (30% divided between 4 subfactors)					
Job Knowledge (7.5%)	7.5	24.5	41.5	58.5	75
Communication (7.5%)	7.5	24.5	41.5	58.5	75
Dexterity (7.5%)	7.5	24.5	41.5	58.5	75
Versatility (7.5%)	7.5	24.5	41.5	58.5	75
Effort (20% divided between 3 subfactors)					
Strain from Lack Of Control Over Work (6.5%)	6.5	16.25	27.5	38.75	50
Physical Demand (6.5%)	6.5	16.25	27.5	38.75	50
Mental Demand (6.5%)	6.5	16.25	27.5	38.75	50
Responsibility (30% divided between 3 subfactors)					
Responsibility for Resources (10%)	10	32.5	55	77.5	100
Responsibility for Decision-making(10%)	10	32.5	55	77.5	100
Responsibility for Others(10%)	10	32.5	55	77.5	100
Working Conditions (20% divided between 2 subfactors)					
Physical Environment (10%)	10	32.5	55	77.5	100
Hazards (10%)	10	32.5	55	77.5	100

EXAMPLE 3:

If your organization decides to weight the factors:

Skill (35%)
Effort (20%)
Responsibility (30%)
Working Conditions (15%)

AND:

Within the four factors you may assign different proportions to the subfactors: (SEE BELOW)

	LEVEL				
	1	2	3	4	5
Skill (35%)					
Job Knowledge (15%)	15	49.0	83	117.0	150
Communication (10%)	10	32.5	55	77.5	100
Dexterity (5%)	5	16.0	27	39.0	50
Versatility (5%)	5	16.0	27	39.0	50
Effort (20%)					
Strain From Lack of Control Over Work (10%)	10	32.5	55	77.5	100
Physical Demand (5%)	5	16.0	27	39.0	50
Mental Demand (5%)	5	16.0	27	39.0	50
Responsibility(30%)					
Responsibility for Resources (10%)	10	32.5	55	77.5	100
Responsibility for Decision-Making (10%)	10	32.5	55	77.5	100
Responsibility for Others (10%)	10	32.5	55	77.5	100
Working Conditions(15%)					
Physical Environment (5%)	5	16.0	27	39.0	50
Hazards (10%)	10	32.5	55	77.5	100

It is not necessary for the committee to assign the weights or the points before evaluating the jobs. In fact, some organizations may choose to determine the factor weights **after** the evaluations have been completed. **Keep in mind the committee should be making its value determinations based on which level of the subfactor best describes the job, rather than considering how many points are at stake.** Even if the organization predetermines the weighting and point distribution for the subfactors the committee does not need to use the points in its evaluations. The points could be applied and totalled after the evaluations are complete.

The following chart gives you point values which can be applied to the five levels for the system in this workbook. They are shown in an ascending order of weighting (on the left side). The horizontal lines show each of the five levels. If, for example, you decide to weight the factor of skill at 40%, and used four subfactors, then each of the subfactors would be worth 10%. You would go to the 10% weighting figure in the left column and then follow along the horizontal line to see the points for each of the five levels. You can then write the points on the page of the system for each subfactor at the appropriate level. The mathematical formula for the points shown in **this** chart is shown on the next page.

	LEVEL				
WEIGHT %	**1**	**2**	**3**	**4**	**5**
5	5	16	28	39	50
7	7	23	39	54	70
8	8	26	44	62	80
10	10	32	55	77	100
12	12	39	66	93	120
13	13	42	71	101	130
15	15	49	82	116	150
20	20	65	110	155	200
25	25	81	138	194	250
30	30	98	165	233	300
35	35	114	193	271	350
40	40	130	220	310	400
45	45	146	248	349	450

How to determine points in the above chart:

STEP 1: ASSUME THE WHOLE SYSTEM HAS A MAXIMUM TOTAL OF 1000 POINTS.

In other words, if a job class were to rate at a Level 5 for each subfactor in the whole system, the total points achievable would be 1000.

STEP 2: DETERMINE THE TOTAL POINTS FOR LEVEL 5

Take the total number of points for the whole system (1000) and multiply by the percentage weight which you are assigning to the sub-factor.

Example: 5% x 1000 = 50 points
(5% = .05)

STEP 3: DETERMINE THE TOTAL POINTS FOR LEVEL 1

This is always the same number as the percentage weight which you are assigning to that sub-factor.

Example: For a weighting of 5%, Level 1 = 5 points

STEP 4: DETERMINE THE POINTS FOR LEVELS 2,3,4 (THE INCREMENT BETWEEN THE LEVELS)

(i) Subtract the points for Level 1 from from the points for Level 5

(ii) Divide the answer by 4*

Example: 50 points - 5 points = 45

$\frac{45}{4}$ = 11 (Rounded off from 11.25)

Level 1 = 5
Level 2 = 5 + 11.25 = 16 (Rounded off)
Level 3 = 5 + 11.25 + 11.25 = 28 (Rounded off)
Level 4 = 5 + 11.25 + 11.25 + 11.25 = 39 (Rounded off)
Level 5 = 50

*In this system, each subfactor has five levels. Thus the "4" above is a constant. Where the number of levels in a system varies for each subfactor, the formula would be changed slightly:

"STEP 4" is summarized in the following formula:

$$\frac{\text{Points for highest level} - \text{Points for lowest level}}{(\text{Total Number of levels} - 1)}$$

The above method is one way of determining points using a weighting process. It does provide a rational distribution of points and reflects the organization's values as pre-determined.

JOB

ANALYSIS

QUESTIONNAIRE

SUGGESTIONS FOR USING THE QUESTIONNAIRE

The following questionnaire was designed to gather information for the twelve subfactors in this system. If you decide to modify or eliminate some of the subfactors, you will have to do the same for the questionnaire. The information gathered by this questionnaire enables the committee to do job evaluation without writing a job description or job information statement.

Remember to communicate the purpose of the questionnaire to employees. It is important to reassure employees that the answers to the questions do **not** represent a performance appraisal. You should stress the need for accurate, honest answers to the questions and that **all** questions should be answered. It is suggested that you can involve everyone in the job evaluation process at this stage by asking each incumbent in a job class to fill out a questionnaire.

You may designate someone to check the answers for consistency of language and content, or you may have the committee perform this task.

S K I L L

SUBFACTOR OF SKILL: Job Knowledge

QUESTIONS pertaining to Job Knowledge:

In some jobs, employees are required to have some formal schooling or formal training which provides them with skills. (This schooling or training could be more or less than what you currently have). To do your job, you may be required to have previous experience in one or more job functions. It is the combination of these experiences which enables you to do the job you are currently doing.

We are trying to measure the accumulated knowledge and experience you have gained which enables you to do the job you are doing today.

1. To do your job are you required to:

	Never	Sometimes	Usually	Always
Read	[]	[]	[]	[]
Write	[]	[]	[]	[]
Use mathematics	[]	[]	[]	[]
Analyze data or situations	[]	[]	[]	[]
Edit written materials	[]	[]	[]	[]
Proofread	[]	[]	[]	[]
Create reports	[]	[]	[]	[]
Compose correspondence	[]	[]	[]	[]
Gather information	[]	[]	[]	[]
Diagnose problems	[]	[]	[]	[]
Solve problems	[]	[]	[]	[]
Fix things	[]	[]	[]	[]
Assemble things	[]	[]	[]	[]

Question 1 - Cont'd

	Never	Sometimes	Usually	Always
Design things	[]	[]	[]	[]
Operate equipment or machinery	[]	[]	[]	[]
Run tests	[]	[]	[]	[]
Make judgments	[]	[]	[]	[]
Do research	[]	[]	[]	[]
Other:				
_____	[]	[]	[]	[]
_____	[]	[]	[]	[]
_____	[]	[]	[]	[]
_____	[]	[]	[]	[]

1(a) Give us a couple of examples of how you use these skills in your job.
(Examples: I keep track of inventory records and make all calculations regarding supplies.
I edit and proofread all correspondence for my supervisor.
I compose routine correspondence on a daily basis for my supervisor.
I analyze and prepare a computerized report showing outstanding accounts receivable.

_____

_____

_____

_____

_____

IF YOU NEED MORE SPACE, ADD A SHEET

We are trying to find out how and where you learned the above named skills which you use in your job.

2. What do you think is the minimum amount of formal education required to learn the job skills you mentioned? (This may be more than or less than what you have) (Check off one or more below)

	Yes	No
Public School	[]	[]
High School (Partial)	[]	[]
High School (Complete)	[]	[]
Home Study (Correspondence)	[]	[]
Community College (Partial)	[]	[]
Community College (Complete)	[]	[]
Business College	[]	[]
University (Partial)	[]	[]
University (Degree)	[]	[]
Post University (Degree)	[]	[]

Other: (Please explain)

_____

_____

_____

_____

In addition to the education required to do your job, you may need training in order to complete your job knowledge requirement.

3. What do you think is the minimum amount of training you need to do your job. (This may be more than or less than what you now have.)

	Yes	No
Apprenticeship training (Leading to Certification)	[]	[]
Training learned in the home	[]	[]
On the job training (Either in your current workplace or other places you have worked)	[]	[]

Other (Please describe):

_____

_____

_____

4. What is the kind of training you need to do your job? (Examples: I need training as a machinist apprentice to do my job. I need computer training to learn the accounting applications.)

_____

_____

_____

_____

_____

_____

_____

5. For each kind of training you listed in both Questions 3 and 4, show how long the period of training is (approximate):

TYPE OF TRAINING: _____

	Yes	No
Less than 6 months	[]	[]
More than 6 months but less than one year	[]	[]
More than one year but less than 3 years	[]	[]
More than 3 years but less than 5 years	[]	[]
More than 5 years but less than 7 years	[]	[]
More than 7 years but less than 10 years	[]	[]
More than 10 years	[]	[]

TYPE OF TRAINING: _____

	Yes	No
Less than 6 months	[]	[]
More than 6 months but less than one year	[]	[]
More than one year but less than 3 years	[]	[]
More than 3 years but less than 5 years	[]	[]
More than 5 years but less than 7 years	[]	[]
More than 7 years but less than 10 years	[]	[]
More than 10 years	[]	[]

TYPE OF TRAINING: _____

	Yes	No
Less than 6 months	[]	[]
More than 6 months but less than one year	[]	[]
More than one year but less than 3 years	[]	[]
More than 3 years but less than 5 years	[]	[]
More than 5 years but less than 7 years	[]	[]
More than 7 years but less than 10 years	[]	[]
More than 10 years	[]	[]

TYPE OF TRAINING: _____

	Yes	No
Less than 6 months	[]	[]
More than 6 months but less than one year	[]	[]
More than one year but less than 3 years	[]	[]
More than 3 years but less than 5 years	[]	[]
More than 5 years but less than 7 years	[]	[]
More than 7 years but less than 10 years	[]	[]
More than 10 years	[]	[]

In some jobs, employees are required to keep learning new skills or to update their training.

6. Is it necessary for you to learn new skills or to update your skills in the job you are doing, either through training or schooling?

	Yes	No
Training	[]	[]
Schooling	[]	[]

If the answer is "Yes", go on to Questions 7, 8 and 9; if "No", go to Question 10.

7. To do my job I must learn new skills through added educational courses or additional training:

	Yes	No
Monthly	[]	[]
Once a year	[]	[]
Twice a year	[]	[]

Other (Please explain):

_____

_____

_____

_____

8. My periods of updated learning usually last:

	Yes	No
One half day or less	[]	[]
One day	[]	[]
Two - Five days	[]	[]
More than five days	[]	[]

Other (Explain):

_____

_____

_____

9. My learning is usually:

	Yes	No
Obtained in a workshop with others present	[]	[]
Obtained in a one on one setting	[]	[]
Obtained through self-study	[]	[]
Obtained at a community college	[]	[]

Other (Please specify):

_____

_____

_____

In addition to education and training, experience at doing the job helps to develop skills used in the job. In some cases your experiences are obtained doing another job (other than the one you are doing now). This combination of education, training and experiences enables you to do your current job.

10. What is the minimum amount of related job experience required to do your job? (Check off one below)

	Yes	No
None	[]	[]
Less than 6 months	[]	[]
More than 6 months but less than one year	[]	[]
More than one year but less than five years	[]	[]
More than five years but less than 10 years	[]	[]
More than 10 years	[]	[]

S K I L L

SUBFACTOR OF SKILL: Communication

QUESTIONS pertaining to Communication:

In some jobs, employees are required to communicate with others. The methods you use while communicating with others are learned skills. We are trying to measure the types of skills you use when communicating with others and to what extent you are required to use them.

1. Do you communicate with others as a <u>requirement</u> of your job?

Yes [] No []

If the answer is "Yes" continue with the rest of the questions in this section. (If "No" go directly to the next set of questions)

2. Do you communicate with: (Check off one or more)

	Never	Sometimes	Usually	Always
Others inside the organization but only within your own area or department	[]	[]	[]	[]
Others inside the organization in other areas or departments <u>excluding</u> upper management	[]	[]	[]	[]
Others inside the organization at <u>all</u> levels	[]	[]	[]	[]
Others outside the organization	[]	[]	[]	[]

Communication - Cont'd

3. For each category in Question 2 you checked off (other than "Never") give an example of the people you are communicating with.

_____

_____

_____

_____

_____

4. When you are communicating with others must you use: (Check off one or more)

	Never	Sometimes	Usually	Always
Courtesy and Tact	[]	[]	[]	[]
Discretion	[]	[]	[]	[]
Explanations	[]	[]	[]	[]
Persuasion	[]	[]	[]	[]
Interpretation	[]	[]	[]	[]
Negotiation	[]	[]	[]	[]
Judgment	[]	[]	[]	[]
Counselling	[]	[]	[]	[]
A language other than English	[]	[]	[]	[]
Other:				
_____	[]	[]	[]	[]
_____	[]	[]	[]	[]
_____	[]	[]	[]	[]

Communication - Cont'd

5. For each of the skills you checked off (other than "Never") in Question 4, on average how often do you use these skills:

Examples: I use negotiation methods - 10% daily
I use a second language requiring explanations - 50% daily
I counsel - 10% monthly

6. Give an example showing when you use the skills you checked off in Questions 4 and described in Question 5:

Example: My job involves handling incoming complaints or service calls from customers for most of the day. I always use tact and courtesy. The situations often require explanations both in French and English.
I must use some interpretation and judgment in deciding what course of action should be taken. I only refer very emotional situations to someone else.

Communication - Cont'd

In many jobs, dealing with people who need special attention or who have problems can require skill in dealing with others. We need to find out the level of difficulty and how often you have these "difficult" interactions.

7. Do you have contact with people that need special assistance or present difficulties or problems to you?

Never [] Sometimes [] Usually [] Always []

If the answer is "Never" you are finished with this section. If the answer is "Sometimes", "Usually" or "Always", continue on with the rest of the questions.

8. In my job, the people requiring special assistance or who present problems or difficulties for resolution are: (Check off one or more below)

	Yes	No
Co-workers (own area)	[]	[]
Employees (in other areas)	[]	[]
Management	[]	[]
Clients	[]	[]
Customers	[]	[]
Suppliers	[]	[]
Students	[]	[]
Patients	[]	[]
Children	[]	[]
General Public	[]	[]
Legislative authorities	[]	[]
Service or maintenance people	[]	[]
Other: _____	[]	
_____	[]	
_____	[]	

Communication - Cont'd

For each of the choices you checked off as "Yes" in Question 8, please fill out the following set of questions for each choice: (Questions 9 - 13 provide the spaces to answer)

9(a) **I provide assistance to _____.**
The nature of the contact is:

	Never	Sometimes	Usually	Always
Routine	[]	[]	[]	[]
Complex	[]	[]	[]	[]
Hostile	[]	[]	[]	[]
Emotional	[]	[]	[]	[]
Other				
_____	[]	[]	[]	[]
_____	[]	[]	[]	[]
_____	[]	[]	[]	[]

An explanation may be given below:

_____

_____

_____

9(b) **What is usually expected and/or required of you when problems are presented: (Check off any that are appropriate):**

I provide routine information only	[]
I refer to others inside/outside my organization	[]
I provide instructions	[]
I provide policy decision	[]
I provide counselling	[]
I solve problems (simple)	[]
I solve problems (complex)	[]
I provide physical restraint	[]

Other: (Describe)

_____

_____

_____

Communication - Cont'd

10(a) I provide assistance to: _____
The nature of the contact is:
(Check off any that are applicable)

	Never	Sometimes	Usually	Always
Routine	[]	[]	[]	[]
Complex	[]	[]	[]	[]
Hostile	[]	[]	[]	[]
Emotional	[]	[]	[]	[]
Other (Describe) _____	[]	[]	[]	[]
_____	[]	[]	[]	[]
_____	[]	[]	[]	[]

10(b) What is usually expected and/or required of you when problems are presented:
(Check off any that are applicable)

I provide routine information only []
I refer to others inside/outside my organization []
I provide instructions []
I provide policy decision []
I provide counselling []
I solve problems (simple) []
I solve problems (complex) []
I provide physical restraint []
Other: (Describe)

_____

_____

_____

Communication - Cont'd

11(a) **I provide special assistance to: _____**
The nature of the contact is:

	Never	Sometimes	Usually	Always
Routine	[]	[]	[]	[]
Complex	[]	[]	[]	[]
Hostile	[]	[]	[]	[]
Emotional	[]	[]	[]	[]
Other				
_____	[]	[]	[]	[]
_____	[]	[]	[]	[]
_____	[]	[]	[]	[]

11(b) **What is usually expected and/or required of you when problems are presented: (Check off any that are applicable)**

I provide routine information only []
I refer to others inside/outside my organization []
I provide instructions []
I provide policy decision []
I provide counselling []
I solve problems (simple) []
I solve problems (complex) []
I provide physical restraint []
Other: (Describe)

_____

_____

_____

Communication - Cont'd

12(a) I provide special assistance to:_____
The nature of the contact is:
(Check off any that are applicable)

	Never	Sometimes	Usually	Always
Routine	[]	[]	[]	[]
Complex	[]	[]	[]	[]
Hostile	[]	[]	[]	[]
Emotional	[]	[]	[]	[]
Other (Describe)				
_____	[]	[]	[]	[]
_____	[]	[]	[]	[]
_____	[]	[]	[]	[]

12(b) What is usually expected and/or required of you when problems are presented:
(Check any that are applicable)

I provide routine information only []
I refer to others inside/outside my organization []
I provide instructions []
I provide policy decision []
I provide counselling []
I solve problems (simple) []
I solve problems (complex) []
I provide physical restraint []
Other: (Describe)

_____

_____

_____

Communication - Cont'd

13(a) I provide special assistance to:_____
The nature of the contact is:

	Never	Sometimes	Usually	Always
Routine	[]	[]	[]	[]
Complex	[]	[]	[]	[]
Hostile	[]	[]	[]	[]
Emotional	[]	[]	[]	[]
Other: (Describe)				
_____	[]	[]	[]	[]
_____	[]	[]	[]	[]
_____	[]	[]	[]	[]

13(b) What is usually expected and/or required of you when problems are presented: (Check off any that are applicable):

I provide routine information only	[]
I refer to others inside/outside my organization	[]
I provide instructions	[]
I provide policy decision	[]
I provide counselling	[]
I solve problems (simple)	[]
I solve problems (complex)	[]

Other: (Describe)

_____

_____

_____

Communication - Cont'd

14(a) I provide special assistance to:_____
The nature of the contact is:

	Never	Sometimes	Usually	Always
Routine	[]	[]	[]	[]
Complex	[]	[]	[]	[]
Hostile	[]	[]	[]	[]
Emotional	[]	[]	[]	[]

Other: (Describe)

_____

_____

14(b) What is expected and/or required of you when problems are presented:
(Check off any that are applicable)

I provide routine information only	[]
I refer to others inside/outside my organization	[]
I provide instructions	[]
I provide policy decision	[]
I provide counselling	[]
I solve problems	[]

Other: (Describe)

_____

_____

_____

_____

S K I L L

SUBFACTOR OF SKILL: Dexterity

Questions pertaining to Dexterity:

In many jobs employees are required to use hand-eye co-ordination, hand foot co-ordination, etc. You may be required to use these skills in your job. You may also be required to use speed and precision of movement while using those skills. This Section will be dealing with how much dexterity you are required to use in your job.

1. **In my job I must use:**

(The following list shows you some examples - Please add to the list depending on your own job.)

	Never	Sometimes	Usually	Always
Calculator	[]	[]	[]	[]
Cash register	[]	[]	[]	[]
Computer	[]	[]	[]	[]
Cutter	[]	[]	[]	[]
Drill	[]	[]	[]	[]
Drill press	[]	[]	[]	[]
Hammer	[]	[]	[]	[]
Gauges	[]	[]	[]	[]
Lathe	[]	[]	[]	[]
Measuring instruments	[]	[]	[]	[]
Phone console	[]	[]	[]	[]
Printer	[]	[]	[]	[]
Printing machine	[]	[]	[]	[]
Bindery machine	[]	[]	[]	[]
Sewing machine	[]	[]	[]	[]
Table saw	[]	[]	[]	[]
Telex	[]	[]	[]	[]
Tools (Manual)	[]	[]	[]	[]
Tools (Automatic)	[]	[]	[]	[]
Typewriter	[]	[]	[]	[]
Typesetter	[]	[]	[]	[]
Word processor	[]	[]	[]	[]

Question 1 continues on the next page

Dexterity - Cont'd

Other:	Never	Sometimes	Usually	Always
_____	[]	[]	[]	[]
_____	[]	[]	[]	[]
_____	[]	[]	[]	[]
_____	[]	[]	[]	[]
_____	[]	[]	[]	[]

2. The following statement best describes my job:
(Check off below - you may pick more than one)

(a) I use my hands for therapeutic treatment - speed is generally not required.
(Example: Chiropractor, Massage Therapist)

Never [] Sometimes [] Usually [] Always []

Give an example:

_____

_____

_____

(b) I use my hands for intricate or finely detailed work. Precision is required but not necessarily speed.
(Example: Jewellery repair, pottery, electronics assembly or repair, sign painting)

Never [] Sometimes [] Usually [] Always []

Give an example:

_____

_____

_____

_____

(Question 2. continues on next page)

Dexterity - Cont'd

(c) I use my hands for fine or detailed manual assembly work or putting parts together. Both precision and speed are a requirement.
(Example: Production assembly, welding, collating materials, sewing)

Never [] Sometimes [] Usually [] Always []

Give an example:

_____

_____

_____

_____

_____

(d) If you use dexterity other than described in the statements above, please use the space below or the back of this page to describe how dexterity is used in your job.

_____

_____

_____

S K I L L

SUBFACTOR OF SKILL: Versatility

Questions pertaining to Versatility:

In some jobs, employees are required to do many job tasks. These job tasks may be related to a particular function. For instance, you may be the bookkeeper and also the accounts payable clerk. On the other hand, your job tasks may be very different from each other (non-related). You may be the bookkeeper and also the sales and marketing secretary. It is a skill to turn readily from one job task to another and it may be required in your job. Sometimes, you may be providing temporary relief by doing a job for an absent employee; in some organizations you may be required to handle all the duties and responsibilities of two or more job functions on a full time basis. In this Section we are trying to measure how much versatility is required in your job.

1. **Do you provide back up or overflow support to other jobs in your organization?**

   Yes [] No []

2. **Does your job involve more than one related area in the organization?**
   (Example: I handle the administration of payroll as well as provide secretarial support to the Manager of Marketing. I handle machine maintenance as well as shipping and receiving duties.)

   Yes [] No []

3. **I am required to provide back up or relief to:**

	Never	Sometimes	Usually	Always
Maintain another job function, handle routine aspects only (someone else handles all problems)	[]	[]	[]	[]
Carry out <u>all</u> the duties and responsibilities of another job function (I handle problems)	[]	[]	[]	[]

QUESTION 3, CONT'D

Other:

_____	[]	[]	[]	[]
_____	[]	[]	[]	[]
_____	[]	[]	[]	[]

4. **I am required to handle job functions which are related to my own area.**

(Example: I handle the payroll administration and I also prepare the accounts payable cheque run).

Yes [] No []

Give an example:

_____

_____

_____

5. **I am required to handle job functions which are quite different in nature.**

(Example: I handle shipping and receiving functions as well as handle rotating duties of a machinist)

Yes [] No []

If you answered "Yes" to Question 5, go on to Question 6.

Versatility - Cont'd

6. **My job tasks involve the following different job functions: SEE INSTRUCTIONS BELOW:**

   (a) Choose one or more from the list below or add your own functions.

   (b) Show whether the job function you do is "Maintenance Only" or "Full Duties" - by printing "MO" or FD" in the space provided.

   (c) Show the amount of time spent as a percentage portion of your: "Day"= D, " Week" = W, "Month" = M, or "Year" = Y).

   (Example: Bookkeeping - Yes - FD - 25% - D)

	Yes	No	MO/FD	Percentage of Time Spent D W M Y
Accounting	[]	[]	[ ]	[ ]
Bookkeeping	[]	[]	[ ]	[ ]
Finance	[]	[]	[ ]	[ ]
Marketing	[]	[]	[ ]	[ ]
Sales	[]	[]	[ ]	[ ]
Training	[]	[]	[ ]	[ ]
Production	[]	[]	[ ]	[ ]
Human Resources	[]	[]	[ ]	[ ]
Research	[]	[]	[ ]	[ ]
Operations	[]	[]	[ ]	[ ]
Purchasing	[]	[]	[ ]	[ ]
Inventory	[]	[]	[ ]	[ ]
Other:				
_____	[]	[]	[ ]	[ ]
_____	[]	[]	[ ]	[ ]
_____	[]	[]	[ ]	[ ]
_____	[]	[]	[ ]	[ ]

(If you require more space please use the back of this sheet)

Versatility - Cont'd

7. Usually, I:

	Yes	No
Know when I will be required to do each of the above chosen functions	[]	[]
Am expected to do other job functions on the "spur of the moment"	[]	[]

Give an example:

_____

_____

_____

E F F O R T

SUBFACTOR OF EFFORT: Strain From Lack Of Control Over Work

Questions pertaining to Strain from Lack of Control Over Work:

In many jobs, employees may not be able to control the nature, flow or pace of work. Not being able to have control over how and when you do your work can involve effort and be a drain on your energy. The following questions will help us to measure how <u>much</u> you are dealing with lack of control over your work.

1. Does your job: (Check off one or more as it applies to your job.

(a) Have a schedule or deadline(s) that is regular and predictable: (Check off below)

Never [] Sometimes Usually [] Always []

Give an example:

_____

_____

_____

(b) Have a pace that sometimes requires increases in speed: (Check off below)

Never [] Sometimes [] Usually [] Always []

Give an example:

_____

_____

_____

Strain From Lack of Control Over Work - Cont'd

(c) **Have a pace that is controlled by others (either by people or equipment or machinery): (Check off below)**

Never [] Sometimes [] Usually [] Always []

Give an example: (State who or what controls your pace)

_____

_____

(d) **Have quotas or fixed requirements for production or service or other: (Check off below)**

Never [] Sometimes [] Usually [] Always []

Give an example:

_____

_____

_____

(e) **Have quotas or fixed requirements for production or service or other that change: (Check off below)**

Never [] Sometimes [] Usually [] Always []

Give an example:

_____

_____

_____

Strain From Lack of Control Over Work - Cont'd

(f) Have deadlines or project requirements that change: (Check off below)

Never [] Sometimes [] Usually [] Always []

Give an example:

_____

_____

_____

(g) Have more than one deadline occurring at the same time and/or deadlines which compete with one another: (Check off below)

Never [] Sometimes [] Usually [] Always []

Give an example:

_____

_____

_____

(h) Require adding extended hours to complete job tasks? (Check off below)

Never [] Sometimes [] Usually [] Always []

Give an example: (Are you requested to work extra hours as a requirement of the job task?)

_____

_____

_____

E F F O R T

SUBFACTOR OF EFFORT: Physical Demand

Questions pertaining to Physical Demand:

Many jobs involve some kind of physical demand on the body. We need to find out about the kind of physical demand or effort placed on your body which is required by your job. We will be measuring how much of your time is spent using physical effort and also whether or not your job involves working shifts or travelling.

1. **To do my job I have to :**
(Check off as applicable)

	Never	Sometimes	Usually	Always
Bend	[]	[]	[]	[]
Carry	[]	[]	[]	[]
Climb	[]	[]	[]	[]
Crawl	[]	[]	[]	[]
Crouch	[]	[]	[]	[]
Grasp	[]	[]	[]	[]
Kneel	[]	[]	[]	[]
Lift	[]	[]	[]	[]
Pull	[]	[]	[]	[]
Push	[]	[]	[]	[]
Sit	[]	[]	[]	[]
Stand	[]	[]	[]	[]
Stoop	[]	[]	[]	[]
Stretch	[]	[]	[]	[]
Twist	[]	[]	[]	[]
Other:				
_____	[]	[]	[]	[]
_____	[]	[]	[]	[]
_____	[]	[]	[]	[]
_____	[]	[]	[]	[]

Physical Demand - Cont'd

For each choice you checked off in Question 1 (other than "Never") give an example showing the amount of <u>time</u> spent using physical effort: (Show as a percentage of Daily, Weekly or Monthly)

Example: I "Push" skids in the plant - 75% of the week
I "Sit" at my computer terminal - 6 hours per day

_____

_____

_____

_____

_____

_____

_____

_____

(If you require more space, please use back of sheet)

2. Do you lift, pull, push, carry or grasp?

Yes [] No []

If you answered "Yes" go on to Question 2(a).
(If you answered "No" go on to Question 3)

Physical Demand - Cont'd

2(a) What is the typical weight of items lifted, pulled, pushed, carried or grasped: (Check off below)

Less than 10 pounds []

More than 10 but less than 30 pounds []

More than 30 pounds []

Give an example of an item and its approximate weight:

_____

_____

_____

3. Do you remain in the same position while doing your job?

Yes [] No []

4. Do you repeat any movements in your job?

Yes [] No []

If you answered "Yes" go on to 4(a).

4(a) Do you use precision or speed while repeating movements or actions as a requirement of your job?

Yes [] No []

5. Do you travel as a requirement of your job (other than normal travel from home to work and back home)?

Yes [] No []

If you answered "Yes" go on to Questions 5(a) and 5(b).
(If you answered "No" go on to Question 6)

Physical Demand - Cont'd

5(a) Do you travel as a requirement of your job:

Daily	[]
Once a week	[]
More than once a week but less than 5 days a month	[]
Once a month	[]
Twice a month	[]
Once every 4 months	[]
Once every 6 months	[]
Once a year	[]
Other (Describe)	

_____

_____

_____

5(b) Does your travel involve staying overnight away from your home as a requirement of your job?

Never [] Sometimes [] Usually [] Always []

6. Do you work shifts as a requirement of your job?

Yes [] No []

If you answered "Yes" go on to Question 6(a).

6(a) Do you regularly work rotating shifts?

Yes [] No []

E F F O R T

SUBFACTOR OF EFFORT: Mental Demand

Questions pertaining to Mental Demand:

In many jobs, employees are required to use their senses (hearing, smelling etc.), or use concentration or creativity. If your job involves any of these things, it puts some drain on your energy from the mental effort you use. In this Section, we will be measuring how much mental effort you are required to use in your job.

1. Do you use concentration to do your job?

Yes [] No []

If you answered "Yes", go on to 1(a).
(If you answered "No" go on to Question 2)

1(a) Are periods of concentration:

	Yes	No
Short	[]	[]
Long	[]	[]

Give an example of how you use concentration:
Examples:

"I operate a video display terminal and must concentrate on editing or proofing for up to 6 hours a day.

I keep inventory records and must concentrate on transferring numbers from written data sheets into the computer for up to 4 hours a day.

I monitor pressure gauges for up to 6 hours a day".

IF YOU NEED MORE SPACE, PLEASE ADD A SHEET

Mental Demand - Cont'd

2. **In my job I check:**

	Never	Sometimes	Usually	Always
Alignment	[]	[]	[]	[]
Numbers	[]	[]	[]	[]
Product for defects	[]	[]	[]	[]
Spelling	[]	[]	[]	[]
Grammar	[]	[]	[]	[]
Content	[]	[]	[]	[]
Other:				
_____	[]	[]	[]	[]
_____	[]	[]	[]	[]
_____	[]	[]	[]	[]

Give an example of what you would be checking in your job:

_____

_____

_____

_____

3. **Do you use creativity in your job?**
(For example: Formatting documents, designing the layout of reports, designing graphics, designing tools, coming up with new ideas for presentations, organizing materials)

Yes [] No []

If you answered "Yes" go on to Question 3(a).

Mental Demand - Cont'd

3(a) Give examples of your job tasks which demand creativity:

_____

_____

_____

_____

4. Do you use your senses as a requirement of your job?

Yes [] No []

If you answered "Yes" go on to Question 4(a).

4(a) Give examples of tasks during which you use your senses:

Examples:

I test machinery and must monitor whether it is operating correctly by monitoring the sounds using my hearing and touching the components for wear.

I transcribe correspondence onto a word processor through the use of a dicta-phone, requiring use of hearing and sight to check content and layout, etc.

_____

_____

_____

_____

_____

_____

R E S P O N S I B I L I T Y

SUBFACTOR OF RESPONSIBILITY: Responsibility for Resources

Questions pertaining to Responsibility for Resources:

In some jobs, employees are expected to be responsible for finances, materials, equipment, machinery, or people. Some of these terms may need to be explained or defined by you so that we can measure the amount of responsibility for resources required in your job.

1. In your job are you responsible for:

	Never	Sometimes	Usually	Always
Budget	[]	[]	[]	[]

1(a) If you are responsible for budget in your job, does it involve:

	Yes	No
Forecasting	[]	[]
Calculating	[]	[]
Preparing	[]	[]
Maintaining	[]	[]
Contributing Information	[]	[]
Other		

_____

_____

If you answer "Yes" to any of the above, how large is the budget for which this job is responsible: (Check off below)

Less than $10,000 []
Over 10 but less than 50,000 []
Over 50 but less than 100,000 []
Over 100 but less than $250,000 []
Over 250 but less than 500,000 []
Over $500,000 []

Responsibility for Resources - Cont'd

2. In your job are you responsible for:

	Never	Sometimes	Usually	Always
Equipment or machinery	[]	[]	[]	[]

2(a) If you are responsible for equipment/machinery in your job does it involve:

	Yes	No
Purchasing	[]	[]
Repair	[]	[]
Maintenance (simple)	[]	[]
Maintenance (complex)	[]	[]

Other

_____

_____

If you answered "Yes" to any of the above, describe a situation or give an example:

_____

_____

_____

2(b) What is the estimated value of the equipment or machinery you are responsible for: (Check off below)

Under $10,000 []
Over 10, but less than 50,000 []
Over 50, but less than 100,000 []
Over 100, but less than 250,000 []
Over 250,000 []

Responsibility for Resources - Cont'd

3. In your job are you responsible for:

	Never	Sometimes	Usually	Always
Materials	[]	[]	[]	[]

3(a) If you are responsible for materials in your job, does it involve:

	Yes	No
Purchasing	[]	[]
Storing	[]	[]
Selecting	[]	[]
Producing	[]	[]
Quality control	[]	[]
Keeping an inventory	[]	[]

Other:

_____

_____

_____

3(b) If you answered "Yes" to any of the above, what would be the result if an error happened in your job: (Check off below)

	Yes	No
Slowdown of work (temporary)	[]	[]
Slowdown of work (major)	[]	[]
Increased costs to organization	[]	[]
Loss of business	[]	[]
Negative impact on public relations	[]	[]

Other:

_____

_____

_____

Responsibility for Resources - Cont'd

4. In your job are you responsible for:

	Never	Sometimes	Usually	Always
Petty Cash	[]	[]	[]	[]

4(a) If you are responsible for petty cash in your job, does it involve:

	Yes	No
Administering	[]	[]
Reconciling	[]	[]
Other (Describe)		

_____

_____

_____

4(b) If you answered "Yes" to any of the above, what would be the result if an error happened on your job: (Check off below)

	Yes	No
Inability to purchase supplies	[]	[]
Employee frustration (minor)	[]	[]
Employee frustration (major)	[]	[]
Other (Describe)		

_____

_____

_____

Responsibility for Resources - Cont'd

5. In your job are you responsible for:

	Never	Sometimes	Usually	Always
Products/service	[]	[]	[]	[]

5(a) If you are responsible for producing things in your job, does it involve: (Check off below)

	Yes	No
Production or servicing of things for use by and for the organization only	[]	[]
Production or servicing of things for use by and for customers, clients or others	[]	[]

5(b) When I am doing my work:

	Yes	No
I usually work on my own	[]	[]
I usually work with one or more others as part of a team to produce things or provide service	[]	[]

Other (Describe)

_____

_____

_____

_____

5(c) Give us some examples of what you produce or services provided.

_____

_____

_____

Responsibility for Resources - Cont'd

5(d) If you answered "Yes" to any of the above, what would be the result if an error happened in the process: (Check off below)

	Yes	No
Loss of business	[]	[]
Increased costs to organization	[]	[]
Negative impact on public relations or image	[]	[]
Embarrassment to colleagues	[]	[]
Other: (Describe)		

_____

_____

_____

5(e) Can you describe a situation or give an example of the above:

_____

_____

_____

_____

Responsibility for Resources - Cont'd

6. In your job are your responsible for:

	Never	Sometimes	Usually	Always
Staff	[]	[]	[]	[]

6(a) If you are responsible for staffing requirements in your job, does it involve:

	Yes	No
Forecasting turnover	[]	[]
Making recommendations regarding hiring for:		
Management	[]	[]
Department	[]	[]
Whole Branch	[]	[]
Whole Organization	[]	[]
Staff counselling	[]	[]
Succession Planning	[]	[]
Setting Salaries	[]	[]
Recommending Salaries	[]	[]
Other (Describe)	[]	[]

_____

_____

6(b) If you answered "Yes" to any of the above, what would be the result if an error happened while doing your job: (Check off below)

	Yes	No
Layoff of staff	[]	[]
Under-utilization of staff	[]	[]
Embarrassment to the organization	[]	[]
Lowering morale of employees	[]	[]
Over-utilization of existing staff	[]	[]
Job tasks cannot be completed	[]	[]
Other (Describe)		

_____

_____

Responsibility for Resources - Cont'd

7. In your job are you responsible for:

	Never	Sometimes	Usually	Always
Supplies	[]	[]	[]	[]

7(a) If you are responsible for supplies in your job does it involve:

	Yes	No
Ordering	[]	[]
Deciding how much to order	[]	[]
Storing	[]	[]
Administering	[]	[]
Keeping track of	[]	[]
or monitoring	[]	[]
Other (Describe)		

_____

_____

_____

7(b) If you answered "Yes" to any of the above, what are the consequences if an error happens in your job: (Check off below)

	Yes	No
Loss of time in doing paperwork	[]	[]
Loss of time dealing with errors	[]	[]
Too much stock (costly)	[]	[]
Too little stock (delays)	[]	[]
Embarrassment for organization	[]	[]
Delay in production/service	[]	[]
Loss of business	[]	[]
Other: (Describe)		

_____

_____

_____

Responsibility for Resources - Cont'd

8. In your job are you responsible for:

	Never	Sometimes	Usually	Always
Tools	[]	[]	[]	[]

8(a) If you are responsible for tools in your job, does it involve:

	Yes	No
Purchasing	[]	[]
Storing	[]	[]
Repairing	[]	[]
Keeping track of	[]	[]
Assigning	[]	[]
Designing	[]	[]

Other (Describe)

_____

_____

_____

8(b) If you answered "Yes" to any of the above, what are the potential consequences if an error happens in your job: (Check off below)

	Yes	No
Delay or slow down in production/service (Minor)	[]	[]
Delay or slow of production/service (Major)	[]	[]
Loss of business	[]	[]
Negative impact on public relations	[]	[]

Other (Describe)

_____

_____

_____

Responsibility for Resources - Cont'd

9. In your job are you responsible for:

	Never	Sometimes	Usually	Always
Information	[]	[]	[]	[]

9(a) If you are responsible for information in your job, does it involve:

Obtaining (simple)	Yes[]	No[]
Obtaining (complex)	Yes[]	No[]
Recording	Yes[]	No[]
Filing	Yes[]	No[]
Generating	Yes[]	No[]
Providing	Yes[]	No[]

Other (describe):

_____

_____

_____

9(b) If you answered "Yes" to any of the above, what are the potential consequences if an error happens in your job: (Check off below)

	Yes	No
Loss of information easy to replace	[]	[]
Loss of information difficult to replace	[]	[]
Incorrect decisions	[]	[]
Delays or slowdowns to organization	[]	[]
Delays or slowdowns to other organizations	[]	[]

Other: (describe)

_____

_____

_____

Responsibility for Resources - Cont'd

10. Are you responsible for any other resources not listed here:

Yes [] No []

10(a) If you answered "Yes", please give details below including any restrictions placed on your responsibility.

_____

_____

_____

_____

_____

_____

10(b) What are the potential consequences of errors:

	Yes	No
Loss of current business	[]	[]
Negative impact on image of organization	[]	[]
Organization under financed	[]	[]
Create cash flow problem	[]	[]
Loss of potential business	[]	[]
Other: (Describe)		

_____

_____

_____

R E S P O N S I B I L I T Y

SUBFACTOR OF RESPONSIBILITY: Responsibility for Decision-making

Questions pertaining to Responsibility for Decision-making:

In some jobs, employees are required to make decisions (on either an informal or a formal basis). To help us measure how much responsibility for decision-making is required in your job, you may give examples or describe the type of situation which prompts you to make a decision.

1. In your job, which of the following statements best describes the usual or standard type of decisions you make: (Check off below)

Job tasks are clearly defined and rules for performing them are available. (No decisions required) [ ]

Job tasks are clearly defined but timing or priority decisions must be made sometimes where competing demands must be balanced. [ ]

Must make procedural decisions on occasions where new circumstances arise but must stay within the guidelines provided. [ ]

Must make policy decisions on occasion, where new circumstances arise and no guidelines or precedents are available. [ ]

2. If you checked off <u>other</u> than the 1st statement, give an example of a decision made for each "check".

You may include an explanation as to why more than one of the above statements applies to your job.

_____

_____

_____

QUESTION 2, CONT'D

As mentioned before, in addition to decisions which are formally required, what are some of the decisions informally required in your job. For example, when your supervisor or colleagues are absent or busy or in a case of emergency?

3. Which of the following statements best describes your job: (Check off one or more below)

Job involves (usually) routine decisions only [ ]

Job involves making decisions requiring some experience and judgement [ ]

Job involves making more difficult decisions involving more analysis and judgment [ ]

Job involves making complex decisions which may involve considerable risk (including life and death) to the organization [ ]

If you can add a statement which better describes your job, use another sheet.

Responsibility for Decision-Making - Cont'd

4. **If you have checked off one or more of the above statements or added your own, please give an example for each and explain why more than one may occur in your job.**

_____

_____

_____

_____

_____

_____

_____

_____

5. **Sometimes, when decisions are made or actions are taken in your job they may have an impact on other jobs. In my job do decisions made affect the success of my: (Check off one or more as applicable):**

	Never	Sometimes	Usually	Always
Work unit only	[]	[]	[]	[]
Department only	[]	[]	[]	[]
Organization's other department(s)	[]	[]	[]	[]
Whole organization	[]	[]	[]	[]
Others outside my organization	[]	[]	[]	[]
Clients/services	[]	[]	[]	[]
Other: (Describe)				

_____

_____

_____

6. If you checked off <u>other</u> than "Never" for one or more of the above statements, give an example or describe a situation for each:

_____

_____

_____

_____

_____

_____

_____

_____

R E S P O N S I B I L I T Y

SUBFACTOR OF RESPONSIBILITY: Responsibility For Others

Questions pertaining to Responsibility for Others:

In some jobs, employees are responsible for the performance and/or safety, health and well being of others as a requirement of the job. To help us measure how much your job involves such responsibility, you may give examples or describe typical situations showing how it is required in your job.

1. **My job involves responsibility for the work or performance of others by: (Check off any of the following as applicable):**

Assigning work to others	[]
Checking work of others	[]
Scheduling work for others	[]
Interviewing candidates for hire	[]
Recommending candidates for hire	[]
Hiring new employees	[]
Orienting new employees	[]
Disciplining employees	[]
Laying off or dismissing employees	[]
Conducting performance appraisals	[]
Determining job requirements	[]
Changing job requirements	[]
Determining salary for job classes	[]
Conducting salary reviews	[]
Develop training programs	[]
*Training employees (own department)	[]
*Training employees (other departments)	[]

Other:

_____

_____

_____

***List all other jobs which receive training from you:**

_____

_____

Responsibility for Others - Cont'd

2. My job involves responsibility for the well-being of others by: (Check off one or more as applicable)

Determining training needs of employees []
Providing training which upgrades skills []
Conducting interviews with employees to determine if the job and person is a good fit []
Providing ongoing support and encouragement []
Caring for employees or other people with special needs (children, customers, general public, etc.) []
Providing referral service for employees with personal or medical needs []
Designing programs to improve quality of work life []
Designing programs which measures productivity (to determine if restructuring of job is needed) []
Other: (Describe)

_____

_____

_____

_____

Please give some examples of the things you checked off in the space provided:

_____

_____

_____

_____

_____

Responsibility for Others - Cont'd

3. My job involves responsibility for the safety of others by: (Check off one or more as applicable)

Determining safety clothing/equipment requirements	[]
Developing safety policies (for department)	[]
Developing safety policies (for branch)	[]
Developing safety policies (for organization)	[]
Conducting safety training	[]
Participating on a safety committee	[]
Disciplining employees for violation or carelessness regarding safety rules	[]
Maintaining control over safeguards and keeping operational and up-to-date	[]
Communicating safety policies and procedures including providing proper signage	[]
Conducting investigations of violations	[]
Conducting random safety spotchecks	[]
Other:	

_____

_____

_____

_____

Please provide explanations if required:

_____

_____

_____

_____

_____

W O R K I N G C O N D I T I O N S

SUBFACTOR OF WORKING CONDITIONS: Physical Environment

Questions pertaining to Physical Environment:

In some jobs employees must deal with a variety of working conditions. You may find in your job that certain disagreeable conditions are present. This Section will measure how much your physical environment affects you while doing your job.

1. **I must deal with the following kinds of disagreeable elements found in my job environment:**
Please add any elements in your job that we have not listed.

	Never	Sometimes	Usually	Always
Blood	[]	[]	[]	[]
Chemical residue or odours	[]	[]	[]	[]
Cold	[]	[]	[]	[]
Dirt	[]	[]	[]	[]
Dust	[]	[]	[]	[]
Fibres	[]	[]	[]	[]
Electricity	[]	[]	[]	[]
Fire	[]	[]	[]	[]
Fumes	[]	[]	[]	[]
Grease/oil	[]	[]	[]	[]
Heat	[]	[]	[]	[]
Human Garbage	[]	[]	[]	[]
Human Bodily Waste	[]	[]	[]	[]
Industrial Garbage	[]	[]	[]	[]
Isolation	[]	[]	[]	[]
Lighting Poor	[]	[]	[]	[]
Lighting Excessive	[]	[]	[]	[]
Noise	[]	[]	[]	[]
No privacy	[]	[]	[]	[]
Odours	[]	[]	[]	[]
Smoke	[]	[]	[]	[]
Small Workspace	[]	[]	[]	[]
Steam	[]	[]	[]	[]

Question 1 continues on next page

QUESTION 1, CONT'D

Other:

_____	[]	[]	[]	[]
_____	[]	[]	[]	[]
_____	[]	[]	[]	[]
_____	[]	[]	[]	[]
_____	[]	[]	[]	[]
_____	[]	[]	[]	[]

1(a) For those disagreeable elements you checked off or added to the list in Question 1, give an example and state how often you are dealing with these elements:

(Show the time involved as a percentage of daily, weekly, or monthly)

DISAGREEABLE ELEMENT	HOW OFTEN

W O R K I N G C O N D I T I O N S

SUBFACTOR OF WORKING CONDITIONS: Hazards

Questions pertaining to Hazards:

In some jobs, employees must deal with a variety of hazardous working conditions. You may find that in your job certain hazards are present as a part of doing your job. This Section will measure how much your job involves dealing with hazards or hazardous elements.

1. In my job I am exposed to the following hazards: (Please add to this list from your own job)

	Never	Sometimes	Usually	Always
Chemicals (Acids etc.)	[]	[]	[]	[]
Electrical equipment or sparks	[]	[]	[]	[]
Exposure to radiation	[]	[]	[]	[]
Hot things which can burn	[]	[]	[]	[]
Infectious disease	[]	[]	[]	[]
Inhalation of things which cause breathing difficulties	[]	[]	[]	[]
Noxious fumes	[]	[]	[]	[]
Open flame	[]	[]	[]	[]
Poor Ventilation	[]	[]	[]	[]
Things which can cause cuts, abrasions or dismemberment	[]	[]	[]	[]
Things which malfunction	[]	[]	[]	[]
Tripping or falling	[]	[]	[]	[]
Violence (including the threat of)	[]	[]	[]	[]

QUESTION 1 CONTINUES ON NEXT PAGE

QUESTION 1, CONT'D

Other:

_____	[]	[]	[]	[]
_____	[]	[]	[]	[]
_____	[]	[]	[]	[]
_____	[]	[]	[]	[]
_____	[]	[]	[]	[]

2. There are hazards in my job which may result in minor injuries requiring first aid treatment:
(Examples: Injuries may include cuts, bruises, minor burns. Hazards may include: sharp tools, heavy objects, hot equipment, electrical, wires, machine malfunctions, etc.).

Yes [] No []

If you answered "Yes", give an example:

_____

_____

_____

_____

3. There are hazards in my job which may result in temporary injuries:
(Examples: Injuries may include: broken limbs, burns, sprains headaches, dizziness etc. Hazards may involve: machine malfunctions; falling equipment, machines, steel beams, debris; gas fumes, violence from clients, customers, accidents involving cars or other vehicles used on the job, fire or hot objects.)

Yes [] No []

Question 3 continues on next page

Hazards - Cont'd

If you answered "Yes", give an example:

_____

_____

_____

_____

4. **There are hazards in my job which could result in long term disabilities:**
(Examples: Disabilities could include: respiratory problems, long term illness, major burns;
Hazards may involve: exposure to radiation; inadequate ventilation with substances such as material fibres in the air; chemical substances such as acids; infectious diseases.)

Yes [] No []

If you answered "Yes", give an example:

_____

_____

_____

5. **There are hazards in my job which could result in permanent disability:**
(Examples: Disabilities could include: loss of hearing or sight, paralysis, long term illness);
Hazards may include: working with fire equipment, extremely loud noises, working with electricity, working at heights where individuals may be at risk of falling or having something fall on them, infectious diseases.)

Yes [] No []

If you answered "Yes", give an example:

_____

_____

_____

Hazards - Cont'd

6. **There are hazards in my job which could result in the loss of life:**
(Examples: Hazards may include: infectious diseases, open gas lines, open flame, heavy objects falling, etc.)

Yes [] No []

If you answered "Yes", give an example:

_____

_____

_____

_____

Pay Equity Tips

PAY EQUITY TIPS

Getting Started

* Start **now** - no matter what your mandatory posting date is. It will take more time than you expect.

* Talk to other people who have done pay equity and learn from their experiences.

* Separate your regular collective bargaining from pay equity negotiations. Pay equity calls for a co-operative approach.

Communication

* It is extremely important to communicate the purpose of pay equity, the steps involved and, be sure to explain the results. Providing adequate information about the pay equity process can reduce feelings of fear, suspicion and misunderstanding and perhaps result in fewer complaints.

* When considering what to communicate, think about:

  .. who sends the message? (president, union head)
  .. who is the audience? what do they want to know?
  .. what do you want to communicate?
  .. when should you communicate?

* Communicate the need for pay equity legislation (page 4) as well as the differences between pay equity and equal pay for equal work, employment equity, internal equity and external equity (the market).

* Communicate to employees the names of the contact people in the organization who will answer questions about pay equity as well as the procedure for complaints during the 90 days after posting.

The process

* Employees are the best source of up-to-date information about job content. Don't start the pay equity process with job information nobody has seen before. Employees will feel very excluded.

* Use the Pay Equity Office as a resource. Review Officers are not just there for dispute resolution.

* If a pay equity plan is subject to ratification by the union membership, make sure this is stated in the minutes of settlement between bargaining agent and employer.

Comparing Jobs

* Get some outside training on gender neutrality in job comparison so people can confront together the bias which may be present in the compensation system.

* Have a different person start the discussion for each job class being considered. This helps everyone keep a sense of involvement; all the responsibility doesn't get left with the chairperson.

* Every job comparison committee seems to develop a set of unspoken rules. For example, a committee may decide at the outset that **every** supervisor ranks at a level "4" on Human Relations Skills. While rules may speed up the process, they can allow bias to enter into the process. Be sure to write down any rules that you decide to use and examine them for bias.

* Beware of the halo effect. This can occur in extreme forms when people evaluate jobs in terms of their **own** ideas about the status of certain jobs. For example, they may rank a job higher if they know the job **currently** earns a high wage. They may associate status with highly paid jobs. Look for **contribution** to the organization instead of status. We cannot completely overcome all our perceptions and conditioning, but we must be aware of this danger.

* Don't saturate yourself. Take breaks from comparing jobs when committee members feel they are losing perspective.

* Revisit your goals often - fairly valuing jobs and eliminating gender bias. How are you doing?

* Check for progress on achieving these goals by going back at intervals to see if any job class rating stands out as very different from similar or comparable jobs classes. If necessary you should go over the process again to review those that stand out.

* Pay equity means challenging some basic values ... this is not an easy or quick process. Don't expect to go through job comparison without disturbing and upsetting existing systems and beliefs.

Avoiding Conflicts Amongst Members of the Pay Equity Committee

* Develop a dispute resolution process for your pay equity committee before you begin the process.

* Encourage committee members to listen to a **full** explanation when the view of others is different.

* Have individual raters make their ratings alone. Only discuss results of individual committee ratings which are **different.** Don't waste time on group debate unless disagreement exists.

* Try to have everyone agree on each job class rating - a majority vote will result in too many disgruntled "losers".

* If job information is still questioned by the committee, have the employee(s) who do the job and/or the supervisor come in to answer questions.

* Consider doing a desk audit if disagreement continues. (This means watching the job being done).

* If you can't reach agreement take a break. Go on to another job class. Discuss the difference again tomorrow.

* Have the disagreeing parties write out the main points they wish to make, as well as a summary of what they think the other party is stating, **before** meeting again.

* Have a neutral person interview each disagreeing party in private to search for areas of agreement.

* Do not give up on the group method of job comparison. Do not assign the task to two people - the quality of the decisions will deteriorate.

* Remember that it gets much easier as you go on. In the first few sessions the major areas of disagreement will have to be resolved.

* This is not a scientific process after which everyone will come out with the same answers...disagreement and debate are normal!

RESOURCES

RESOURCES

The Pay Equity Act, 1987:

Copies can be obtained from:

The Ontario Government Bookstore
880 Bay Street, Toronto, Ontario M7A 1N8
416-965-2054

Publications Services Section
5th Floor, 880 Bay Street, Toronto, Ontario M7A 1N8
416-326-5300 or toll-free in Ontario 1-800-668-9938

Telephone Counsellors:

For any pay equity questions, contact the Pay equity Commission Hotlines:

Toll free in Ontario
1-800-387-8887 and 1-800-387-8813

Toronto area
416-481-3314 and 416-481-3315

Publications and Videos:

You can order publications and videos by writing to the Pay Equity Commission,
150 Eglinton Avenue East, Fifth Floor,
Toronto, Ontario M4P 1E8,
or by telephoning the Hotlines.

All the materials are free, except for the videos. The two pay equity videos, which are on one cassette, are $25 including tax.

Pay Equity Implementation Series #'s 1-18:

These guidelines to the legislation give implementors a step by step method of implementing pay equity.

How to Do Pay Equity Job Comparisons:

This book has chapters on "Collecting and Recording Job Information," "Understanding Job Evaluation" and "Ensuring Gender Neutrality in Job Evaluation."

Pay Equity Commission Newsletters

Be sure you are on the Commission mailing list to receive all future newsletters. Selected topics follow:

Vol.1, No.5	Accurate, Gender-Neutral Job Information - the Cornerstone of Pay Equity
Vol.1, No.7	Principles of Gender Neutrality to Help You Achieve Pay Equity
Vol.1, No.8	Pay Equity in Your Workplace: Communicating the Process
Vol.1, No.9	Assessing the Gender Bias of Your Point Factor System
Vol.2, No.11	Working Conditions in Your Workplace - Give this Factor the Close Scrutiny It Deserves

Pay Equity Videos:

A Matter of Fairness -- 21 minutes

Video segments include:
- o an overview of pay equity and how the legislation works
- o implementation in a non-union environment and in a union environment

Pay Equity Equals Dollars and Sense -- 22 minutes

Video segments include:
- o the actual content of predominantly female jobs to see what has been ignored or undervalued in women's work
- o employers discussing the potential benefits of pay equity to their organizations

Both videos are included on one cassette, The total cost is $25 including tax. The two videos or individual segments of them are useful for employer, employee and bargaining agent audiences.

Community College Courses:

All Ontario community colleges offer courses on pay equity. For information on actual course offerings and registration, contact your local college.

ACKNOWLEDGEMENTS

ACKNOWLEDGEMENTS

The Pay Equity Office is grateful for the time and attention of the following people who contributed ideas on how to implement pay equity, and/or who commented on drafts of the manuscript. The final version of this workbook, however, is the sole responsibility of the Pay Equity Office.

Barbara Allen
Ruth Anne Assmann
Brian Atkinson
Mary Lynn Biggley
Oscar Braganza
Barbara Browne
Stephanie Crawford
Jim Dinsmore
Brian Donaldson
Keith Glaze
Debbie Graham
Lois Haignere
Ann Hawkins
Spencer Hope
Nell Hostetler
Pennie Jensen
Alexia Landon
Barbara McBride
Claudette Munger
Bob Nunney
Joe Palis
Lynne Pratt
Wayne Simpson
Dick Spahn
Alvin Tiessen
John Weedon
Peter Woolford